Department of the Army
Headquarters, United States Army
Training and Doctrine Command
Fort Eustis, Virginia 23604-5700

*TRADOC Regulation 600-21

5 December 2014

Personnel - General

NONCOMMISSIONED OFFICER EDUCATION SYSTEM INSTRUCTOR DEVELOPMENT AND RECOGNITION PROGRAM

FOR THE COMMANDER:

OFFICIAL:

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Lieutenant General, U.S. Army
Deputy Commanding General/
  Chief of Staff

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Colonel, GS
Deputy Chief of Staff, G-6

History. This publication is a rapid action revision of United States Army Training and Doctrine Command (TRADOC) Regulation 600-21.

Summary. This regulation prescribes policies and procedures for implementing the Noncommissioned Officer Education System (NCOES) Instructor Development and Recognition Program.

Applicability. This regulation applies to current NCOES instructors.

Proponent and exception authority. The proponent for this regulation is the Institute for Noncommissioned Officer Professional Development (INCOPD).

Army Management Control Process. This regulation contains management control provisions, but does not identify key management controls that must be evaluated.

Supplementation. Supplementation of this regulation is prohibited unless specifically approved by Director, INCOPD, 950 Jefferson Ave, Fort Eustis, VA 23604-5752.

Suggested improvements. Users are invited to send comments and suggested improvements on Department of the Army (DA) Form 2028 (Recommended Changes to Publications and Blank Forms) directly to Director, INCOPD, 950 Jefferson Avenue, Fort Eustis, VA 23604-5752.

*This regulation supersedes TRADOC Regulation 600-21, dated 10 July 2013.

TRADOC Regulation 600-21

Distribution. This publication is available in electronic media only and is published on the TRADOC homepage at http://www.tradoc.army.mil/tpubs/.

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Summary of Change

TRADOC Regulation 600-21
United States Army Training and Doctrine Command Noncommissioned Officer Education System Instructor Development and Recognition Program

This rapid action revision, dated 5 December 2014-

o Removes all references to Additional Skill Identifiers and replaces with Personnel Development Skill Identifier throughout the publication.

o Removes all references to Additional Skill Identifiers 8I, 8G, and 8M and replaces with Personnel Development Skill Identifiers B1A, B2A, and B3A throughout the publication.

o Adds the requirement for Noncommissioned Officer Academy Commandants to maintain administrative records associated with the Instructor Development and Recognition Program for a minimum of five years (para 2-6).

o Clarifies Noncommissioned Officer Education System instructor eligibility requirements for the Instructor Development and Recognition Program (para 4-1).

o Clarifies the Noncommissioned Officer Academy Commandant's role in determining Instructor Development and Recognition Program eligibility for instructors who support their Academy but are not formally assigned (para 4-1).

o Removes the lesson design requirement for Master Instructor Badge recognition throughout the publication.

o Adds additional raters and qualifications for grading the Senior Instructor Badge lesson redesign requirement (Table 4-1).

o Changes lesson redesign passing score requirement (para 4-4d).

o Adds additional guidance regarding the evaluation of distributive learning Noncommissioned Officer Education System instructors and guidance regarding the tracking of primary instructor hours (para 4-5a).

o Adds the requirement that Noncommissioned Officer Education System instructors must complete recognition requirements before departing a Noncommissioned Officer Academy position throughout the publication.

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o Emphasizes the requirement that Noncommissioned Officer Education System instructors must be evaluated by an evaluator who certified by the Institute for Noncommissioned Officer Professional Development throughout the publication.

o Removes the Advanced Facilitator Skills Course and/or equivalent Faculty Development Program-1 course requirements for Senior Instructor Badge recognition throughout the publication (para 4-5c and Table 4-12).

o Removes the Instructional Design Basic Course, Faculty Development Program-3 course, Test Construction Course, and Test Development course requirements for Master Instructor Badge recognition throughout the publication (para 4-5d and Table 4-12).

o Adds the Advanced Facilitator Skills Course and/or equivalent Faculty Development Program-1 course requirement for Master Instructor Badge recognition throughout the publication (para 4-5d and Table 4-12).

o Updates the required courses and course equivalents for badge recognition (Table 4-12).

o Clarifies administrative processes for awarding the Army Instructor Badge (para 4-7).

o Updates Department of the Army Form 4187 example (Figure 4-2).

o Updates glossary (Section I).

o Adds a definition for the term "technical instructor" (Section II).

o Updates Training and Doctrine Command Form 600-21-1-R-E example (Section III).

This new publication, dated 10 July 2013-

o Establishes policies and procedures for the United States Army Training and Doctrine Command Noncommissioned Officer Education System Instructor Development and Recognition Program.

o Provides an interview protocol to use in selecting Soldiers for instructor positions (chap 3).

o Establishes three levels of instructor recognition, performance outcomes for each level, instructor development plan for each level and evaluation instruments to assess instructors at each level (chap 4).

o Establishes procedures for conducting Master Instructor Selection Board for Senior Instructors (chap 5).

o Prescribes the use of United States Army Training and Doctrine Command Forms 600-21-1, *Noncommissioned Officer Education System Instructor Observation Rubric* (appendix H), 600-21-2, *Master Instructor Board Member Appraisal Worksheet*, and 600-21-3, *Master Instructor Board Recommendation* (appendix J).

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Chapter 1
Introduction

1-1. Purpose
This regulation provides the policy and procedures for implementing the Noncommissioned Officer Education System (NCOES) Instructor Development and Recognition Program (IDRP) and award of Army Instructor Badges to NCOES instructors. The IDRP will enhance the Noncommissioned Officer Academies (NCOA) instructors by selecting, training, and managing the best, as well as provide added value to unit training when the instructor returns to the field. United States Army Training and Doctrine Command (TRADOC) recognizes the need to support instructor development and establish incentives for Soldiers who want to excel as instructors. This change in instructor development is a critical part of improving the NCOES.

1-2. References
Required and related publications and prescribed and referenced forms are listed in appendix A.

1-3. Explanation of abbreviations and terms
Abbreviations and special terms used in this regulation are explained in the glossary.

Chapter 2
Responsibilities

2-1. Deputy Commanding General/Chief of Staff, United States Army Training and Doctrine Command (TRADOC)
The TRADOC Deputy Commanding General/Chief of Staff will approve changes to this regulation.

2-2. TRADOC Command Sergeant Major

   a. Monitor execution of the IDRP in NCOES.

   b. Assist NCOA commandants (as necessary) with the selection and assignment of instructors.

   c. Participate in Master Instructor recognition ceremonies.

2-3. Director, Institute for Noncommissioned Officer Professional Development (INCOPD)
will-

   a. Write, update, and obtain approval of this regulation.

   b. Review proposed changes for NCOES IDRP requirements, policies, and procedures.

   c. Conduct reviews of this regulation every 18 months, providing updates as required to the Deputy, Chief of Staff.

d. Initiate actions to ensure that the intent of this regulation is followed; conduct periodic observations, and briefings on the program.

e. Provide a member of INCOPD to serve as a voting member on all Master Instructor Selection Boards for a period of two years from the implementation date of this regulation. After that time, periodically monitor the conduct of Master Instructor Selection Boards.

f. Provide training for evaluators that assess instructor performance.

2-4. Commanding Generals/Commanders/Commandants
Commanding Generals/Commanders/Commandants will-

a. Oversee administration of instructor recognition evaluations and award the instructor badges, and personnel development skill identifiers (PDSI) to qualified Soldiers in their commands in accordance with Army regulation (AR) 600-8-22 and AR 614-200.

b. Review and approve (as appropriate) personnel actions to rescind the instructor badge and associated PDSIs.

c. Periodically review the effectiveness of the program and provide INCOPD recommendations to improve the program.

2-5. Center/Regiment/School Command Sergeant Major

a. Assist with administration of instructor recognition evaluations and award the instructor badges, and PDSIs to qualified Soldiers in their commands in accordance with AR 600-8-22 and AR 614-200.

b. Assist with ensuring only highly qualified Soldiers are selected to serve as instructors.

c. Provide TRADOC Command Sergeant Major and INCOPD recommendations to improve the program.

2-6. Noncommissioned Officer Academy (NCOA) Commandants
NCOA commandants will-

a. Serve as the president of the Master Instructor Selection Board as a voting or non-voting member, and perform duties of the president.

b. Designate personnel to collect and input data for surveys, quarterly and annual reports for INCOPD.

c. Designate a lead person at the academy for implementing the program.

d. Be a member of the interview team for selecting instructors.

e. Initiate personnel actions for the award or rescinding of Army Instructor Badges.

f. Verify personnel conducting instructor observations have been trained to evaluate instructor performance using TRADOC Form (TF) 600-21-1 or an INCOPD approved alternative.

g. Coordinate with Staff and Faculty Development Divisions, INCOPD and other organizations to ensure training and education related to this program is available for instructors.

h. Complete and maintain records associated with this program for a minimum period of five years.

i. Establish local procedures for participation in the program.

j. Coordinate with S-1/G-1/Personnel Service Centers to process personnel actions for award or rescinding of instructor badges, PDSIs and associated updates to the Soldier's enlisted record brief (ERB) and OMPF.

k. Complete Department of the Army (DA) Form 4187 to document Soldiers that meet the requirements for instructor recognition and maintain personnel records for a minimum period of five years from a Soldier's departure from a NCOA instructor position.

l. Select Soldiers to serve as NCOA instructors.

Chapter 3
Instructor Selection

3-1. General.
Research indicates that students taught by effective instructors achieve more than those taught by less effective instructors, and researchers have identified qualities of effective instructors. The goal is to select Soldiers who demonstrate those qualities by following an evidence-based selection process. NCOAs should use the selection process (when feasible) described below prior to a Soldier being assigned to the NCOA in order to separate Soldiers that have more potential to be effective instructors from those with less potential. The process consists of two phases.

3-2. Instructor Selection Phase I.

a. Phase I includes basic eligibility requirements. Interested Soldiers will complete an Instructor Application Packet (see Appendix B) and submit it with supporting documentation to the NCOA point of contact. The Application Packet will include, at a minimum:

(1) A copy of the Soldier's ERB.

(2) Last three noncommissioned officer evaluation reports (NCOER).

(3) A copy of the Soldier's Academic Evaluation Report from the last NCOES course attended.

(4) A Letter of Recommendation written by a current superior who will attest to the Soldier's character and potential as an instructor.

(5) A Letter of Intent, written by the applicant stating why they want to become an instructor.

(6) A signed acknowledgement that the Soldier has reviewed and meets the basic eligibility requirements in accordance with AR 614-200, chapter 6.

b. Once the NCOA receives the complete Application Packet, they will evaluate the Soldier using the criteria listed in the Screening Worksheet (See Appendix B, Part II). The Soldier will be notified of their eligibility results and if qualified will progress to Phase II.

3-3. Instructor Selection Phase II.

a. Phase II consists of an interview that can be conducted via telephone, video teleconference, or face-to-face. The interview is a way to assess the remaining instructor qualities that cannot be assessed from the application packet. The Teacher Quality Index-Military (TQI-M) interview protocol is aligned with the International Board of Standards for Training, Performance, and Instruction (ibstpi®)[1] competencies INCOPD used in this program.

b. The TQI-M Instructor Interview Protocol (see Appendix C) includes instructions for conducting the interview and rating the applicant's responses. A minimum of two people should conduct the interview; the NCOA commandant and his/her designated personnel. The team will select the questions to be asked prior to the interview. All applicants will be asked the same questions in their interview and rated according to the scoring rubric. For Soldiers who do not have prior teaching experience, the interviewer should prompt the Soldier to give examples from unit training situations and other accomplishments in his/her career. Once a Soldier is selected, commandants will follow DA and local policies and procedures for getting the Soldier assigned to the NCOA.

Chapter 4
Policies and Procedures

4-1. General.
NCOES instructors who are assigned to a NCOA after 7 June 2013 and teach approved NCOES content under the supervision of a NCOA commandant are eligible for the IDRP. NCOA commandants may assess curricula to determine the eligibility of technical instructors (see Glossary) who support their NCOA but are not formally assigned. The assessed curriculum must be congruent with the required instructor competencies (see Appendix D, Table D-1) and technical instructors must meet all prescribed instructor assessment, selection and training requirements before the supported commandant determines eligibility. TRADOC Regulation

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[1] Copyright 2003 by the International Board of Standards for Training, Performance and Instruction. All rights reserved.

350-70 prescribes the instructor/facilitator certification policy for all personnel that instruct/facilitate within TRADOC. NCOES instructors must meet TRADOC instructor certification requirements per TRADOC Regulation 350-70 before becoming eligible for the instructor recognition levels outlined in this program (see Figure 4-1). The IDRP contains three levels of instructor recognition, performance outcomes for each level, an instructor development plan to achieve the levels, and an evaluation plan to assess instructors at each level. Participation in the IDRP is voluntary.

Figure 4-1. Instructor Progression

4-2. Instructor Competencies.
Appendix D displays a list of instructor competencies with performance outcomes for each level of instructor recognition.

4-3. Instructor Training and Education.
Appendix E displays a matrix of training that is available to improve performance of each competency.

4-4. Instructor Assessments
Appendix F displays a matrix that shows the assessment instruments and items that are used to assess each competency. This chapter contains descriptions of the assessment instruments followed by Table 4-1 that shows the qualifications required for personnel to evaluate instructors. Because this program is new, the table also includes alternative methods to conduct the evaluations in the event an academy does not have someone qualified to administer an assessment. INCOPD will provide the initial training for evaluators and develop a mechanism for NCOAs to conduct sustainment training for evaluators. Chapter 5 contains details about the Master Instructor Selection Board.

   a. Assessment Instruments. Assessments are critical for evaluating and improving performance and guiding professional development. At each successive level, instructors will be assessed on how well they are performing and monitored on their performance in higher-level skills. The assessments listed in the following paragraphs provide multiple instruments for evaluating/self-evaluating instructor strengths and weaknesses, providing feedback on how they are doing in the classroom, and how they can focus on improvement. The self-assessment is for developmental purposes and is the only assessment instrument that is not required for awarding the instructor recognition badges.

   b. Instructor Self-Assessment. An Instructor Self-Assessment (see Appendix G) helps guide the instructor in assessing and planning appropriate developmental activities. Instructors should share the self-assessment with their supervisors and compare it with the results of their most recent evaluation. As the instructor's performance improves, the correlation between the self-assessment and instructor observation results should improve.

c. Instructor Observation Rubric. Use the Instructor Observation Rubric, TF 600-21-1 (see Appendix H) to evaluate an instructor's performance. Once an instructor decides to participate in the IDRP, all observations should be evaluated using TF 600-21-1 or an approved substitute (see para 4.4.c.(1)). Only qualified personnel should conduct the evaluations that are submitted as part of an instructor recognition packet (see Table 4-1). Use the observation results to update the instructor's self-development plan, and determine successful progression through the instructor levels.

(1) Organizations may submit a request to INCOPD to substitute a center/school specific observation rubric for TF 600-21-1. The request must include a cross walk that shows how the substituted rubric measures the competencies for Instructor, Senior Instructor, and Master Instructor recognition; the score that must be achieved for each recognition level; and a description of the process used to train evaluators to use the rubric.

(2) INCOPD will review the request and determine if the substitute rubric is sufficient to ensure that the minimum standards for the award of each recognition level are met. If INCOPD determines the rubric is not sufficient, then the center/school that submitted the rubric will be contacted to discuss changes that are necessary to make the rubric meet the IDRP standards.

(3) INCOPD will provide the center/school a memorandum for record to document the acceptance of the substitute rubric. If the center/school makes changes to the rubric, then they must submit the revised rubric to INCOPD and gain approval prior to using it to award instructor recognition.

d. Course/Lesson Design Checklist. Instructors will use lessons from their NCOES program of instruction to meet the lesson redesign requirement. The proposed lesson redesign submitted for review will be compared to the current lesson plan and evaluated for its use of evidenced-based instructional design strategies and principles as outlined in the Course/Lesson Design Checklist (see Appendix I). Only qualified personnel should evaluate an instructor's lesson design/redesign when the result will be documented in the instructor recognition packet for progression (see Table 4-1). All of the items on the checklist will not apply to every lesson; therefore, a score should be computed by dividing the number of items rated as "GO" by the total number of items evaluated. Instructors seeking the Senior Instructor Badge should score at least 80% when they redesign a lesson. This checklist will be used only to evaluate instructor performance on the lesson redesign requirement; it is not mandatory that the revised lesson be used or taught in the classroom. Organizations that use a specific learning methodology that appears to be in conflict with the checklist may submit a request to INCOPD to substitute a checklist or rubric based on their preferred methodology. The request must include the scores required for Senior Instructor recognition.

Table 4-1
Rater Qualifications/Substitutes

	Item/Event	Rater(s)	Rater Qualifications	Alternative if qualified personnel are not available
1	Instructor Observation Rubric (TF 600-21-1)	Designated Evaluator	Must have successfully completed INCOPD's *Instructor Evaluation Training*	If a certified evaluator is not available, contact INCOPD to coordinate a mechanism to assess the instructor. Alternatives may include submitting a videotape to INCOPD or coordinating to have a certified evaluator from another academy conduct the observation.
2	Course Lesson Design/Redesign Checklist	Noncommissioned Officer Academy (NCOA) or Center of Excellence (CoE) civilian and military personnel	- Education Series Personnel in Series: GS-1750 or personnel GS-1712 who have completed an undergraduate degree in Education and/or 15 hours toward a graduate degree in Education or - Personnel who have successfully completed Faculty Development Program-3 (FDP-3), Advance Training Developer Course (ATDC), or INCOPD's Instructional Design Basic Course (IDBC)	Submit the lesson to INCOPD for evaluation.

4-5. Instructor Recognition Requirements

a. NCOES instructors must meet all of the prescribed recognition requirements before departing a NCOES instructor position. Evaluations will be conducted by an INCOPD certified evaluator in a face-to-face educational setting. NCOES instructors who solely teach distributive learning (DL) content will need to coordinate with the commandant to be evaluated in the required setting. The commandant is responsible for maintaining a detailed tracking system for primary instructor hours. Primary instructor hours are instructional hours allocated in the training support package to the lead instructor to prepare and instruct NCOES curriculum. Instructional hours accrued teaching courses that are not part of the NCOES curriculum will not be counted for IDRP progression. For NCOES instructors serving after 7 June 2013, instructional hours accrued in their current instructor position, but prior to the program implementation date may be counted if the commandant can validate the instructional hours. NCOES instructors are encouraged to request a memorandum for record that details the amount of primary instructor hours accrued prior to departing an instructor position. A memorandum for record may be used by prospective commandants to validate requirements for continued IDRP progression in another NCOES instructor position.

b. Army Instructor Recognition and Badge. Soldiers performing at this level are able to facilitate and present instruction in a variety of learning environments. Instructors closely adhere to the instruction outlined in the training support package and effectively plan, prepare and execute instruction. They communicate effectively and apply various instructional methods, media, and educational technology in order to facilitate learning and present instruction. Instructors at this level question students and provide effective feedback, promote learning retention and transfer, assess learning, and counsel students. Instructors perform self-assessments to improve their performance. To receive the Army Instructor Badge and PDSI B1A, Soldiers must:

(1) Meet all instructor requirements in AR 614-200.

(2) Have current passing APFT score. This cannot be waived because of temporary profile or pending MRB.

(3) Meet body composition requirements in AR 600-9.

(4) Complete TRADOC instructor certification requirements per TRADOC Regulation 350-70 and local requirements.

(5) Successfully teach at least 80 hours of instruction as the primary instructor after completing TR 350-70 instructor certification requirements.

(6) Must be evaluated by an INCOPD certified evaluator; cannot have a rating of 3 or more NO-GOs in Section 1 and must score 24 or higher in Section 2 (with no zero ratings) on the Instructor Observation Rubric, TF 600-21-1 (see appendix H) for the last two consecutive evaluations (conducted at a minimum of 30 days apart).

(7) Complete all requirements before departing a NCOES instructor position.

c. Army Senior Instructor Recognition and Badge. In addition to continuing to improve instructor skills, Senior Instructors also use student reaction and learning data to recommend areas for instructor improvement or curriculum changes. They are able to redesign lessons to update content or implement other changes (instructional method, media) approved by the appropriate authority (e.g. course manager, training developer). They may be members of the Instructor Selection Team to screen and interview Soldiers applying to become instructors. To receive the Army Senior Instructor Badge and PDSI B2A, Soldiers must:

(1) Meet all instructor requirements in AR 614-200.

(2) Have current passing APFT score. This cannot be waived because of a temporary profile or pending MRB.

(3) Meet body composition requirements in AR 600-9.

(4) Complete TRADOC instructor certification requirements per TRADOC Regulation 350-70 and local requirements.

(5) Meet all requirements for Army Instructor Recognition and Badge.

(6) Successfully teach at least 400 hours of instruction as the primary instructor after being awarded the Army Instructor Badge.

(7) Complete the following training: (1) Small Group Instructor Training Course (SGITC) or Intermediate Facilitation Skills Course (IFSC); (2) Systems Approach to Training Basic Course (SATBC) or Foundation Training Developer Course (FTDC).

(8) Must be evaluated by an INCOPD certified evaluator; cannot receive a rating of 3 or more NO-GOs in Section 1 and must score 32 or higher in Section 2 (with a rating of 2 or higher for at least 12 rating areas) and no areas rated zero on the Instructor Observation Rubric, TF 600-21-1 (see appendix H) for the last two evaluations (conducted at a minimum of 30 days apart)

(9) Redesign a lesson and score at least 80% on the Course/Lesson Design Checklist (see Appendix I) (This requirement is for redesign only, it is not necessary for the instructor to use the lesson in the classroom).

(10) Complete all requirements before departing a NCOES instructor position.

d. Army Master Instructor Recognition and Badge. Master Instructor recognition is the highest level that can be attained by an instructor and is representative of Soldiers that choose to become fully knowledgeable learning professionals. Master Instructors serve on Master Instructor selection boards. They demonstrate an in-depth understanding of the fundamental principles of learning, design, and implementation. Master Instructors are able to redesign/design new lessons and make evidence-based recommendations regarding instructional strategies, methods, media and technology while continuously striving to update their knowledge of evidence-based learning practices. To receive the Army Master Instructor Badge and PDSI B3A, Soldiers must:

(1) Meet all instructor requirements in AR 614-200.

(2) Have current passing APFT score. This cannot be waived because of a temporary profile or pending MRB.

(3) Meet body composition requirements in AR 600-9.

(4) Complete TRADOC instructor certification requirements per TRADOC Regulation 350-70 and local requirements.

(5) Meet all requirements for Army Senior Instructor Recognition and Badge.

(6) Successfully teach at least 400 hours of instruction as the primary instructor after being awarded the Senior Instructor Badge.

(7) Complete the following training: (1) Advanced Facilitator Skills Course (AFSC) or Faculty Development Program (FDP) 1: (2) Evaluating Instructors Workshop.

(8) Must be evaluated by an INCOPD certified evaluator; cannot have a rating of 3 or more NO-GOs in Section 1 and must score 40 or higher in Section 2 (with a rating of 3 on at least 8 rating areas) and no areas rated zero on the Instructor Observation Rubric, TF 600-21-1 (see appendix H) for the last two evaluations (conducted at a minimum of 30 days apart).

(9) Be recommended by the Master Instructor Selection Board on TRADOC Form 1023.

(10) Complete all requirements before departing a NCOES instructor position.

4-6. Mandatory Course Equivalents
The required training courses listed for each instructor recognition level are listed in applicable DA regulations; however, because TRADOC continuously updates course content and names, the table below displays acceptable substitutes for the required courses for instructor recognition. NCOAs should coordinate with INCOPD to update this table as necessary when other courses become available that may be considered equivalent to a required course. INCOPD will evaluate the suggested equivalent course and make the final determination regarding equivalency.

Table 4-2
Course Equivalents

Required Course	Approved Equivalent Alternatives
Army Basic Instructor Course (ABIC)	Foundation Instructor Facilitator Course (FIFC)
Small Group Instructor Training Course (SGITC)	Intermediate Facilitation Skills Course (IFSC)
Systems Approach to Training Basic Course (SATBC)	Foundation Training Developer Course (FTDC)
Advanced Facilitator Skills Course (AFSC)	Faculty Development Program 1 (FDP1)
Evaluating Instructors Workshop	None

4-7. Process

Participation in the IDRP is voluntary. There is no required timeline for progression through the levels; the instructor and their supervisory chain should manage the progression based on how well the instructor performs and completes the requirements. It is likely that a new instructor will not be able to progress through all levels within their first assignment to the academy; however, instructors may continue to progress in the program during subsequent assignments to the academy. Other Soldiers may choose not to participate in the program; however, they should continue to be coached by their supervisor in order to improve their performance.

a. Instructors may choose to participate in the IDRP any time after they complete instructor certification requirements per TR 350-70. An instructor that decides to participate in the program will notify their immediate supervisor and complete a self-assessment (see appendix G). The supervisor will complete a formal counseling to ensure the instructor understands the program requirements and local procedures for documenting progress in the program.

b. The supervisor will notify the academy lead for the program to ensure the instructor is included in future program reports.

c. The supervisor and instructor will schedule formal and informal evaluations and document performance on the Instructor Observation Rubric (TF 600-21-1) or DA Form 4856. Only personnel who are qualified to use the Instructor Observation Rubric (TF 600-21-1) (see Table 4-1) will conduct formal evaluations used to apply for recognition.

d. When an instructor has met the requirements for recognition as an instructor, senior instructor or master instructor, the supervisor and instructor will prepare a packet with documentation that shows the instructor has completed the requirements. At a minimum, the packet should include:

(1) APFT card showing a passing score within the last six months.

(2) Current (in the last six months) APFT card or DA Form 5500 or DA form 5501 showing the Soldier meets body composition requirements in AR 600-9.

(3) Documentation showing completion of TRADOC instructor certification requirements per TRADOC Regulation 350-70 and local certification requirements.

(4) Documentation that the instructor has completed the required number of hours as a primary instructor for the recognition level (see paragraph 4-5).

(5) Documentation that the instructor has completed required training for the recognition level (see paragraph 4-5).

(6) The last two instructor observation rubrics (TF 600-21-1) showing the instructor met the performance level for the desired recognition level (see paragraph 4-5).

(7) For instructors seeking senior level recognition, the Course/Lesson Design Checklist (Appendix I) showing the instructor met the lesson redesign requirements (see paragraph 4-5).

e. The NCOA commandant will review the packet to verify all requirements have been met. For instructor and senior instructor recognition, the NCOA will prepare a DA Form 4187 (see Figure 4-2) requesting award of the recognition level and submit the packet to the awarding authority (in accordance with AR 600-8-22 and AR 614-200).

f. The awarding authority will review the packet, endorse the DA 4187 (as appropriate) and return the packet to the NCOA.

g. The NCOA will provide the completed DA Form 4187 to the Personnel Service Center to process orders for the award of the instructor badge and appropriate PDSI (B1A, B2A or B3A).

h. New PDSI entries and changes must be sent to the designated Human Resources Command (HRC) point of contact to be entered and tracked in the Enlisted Distribution and Assignment System (EDAS)

i. Commandants must ensure that Soldiers update their personnel records to reflect award of the instructor, senior instructor, or master instructor badge and verify Personnel Service Centers send orders awarding the Army Instructor Badge to HRC in accordance with AR 600-8-22.

j. For instructors seeking master level recognition, the NCOA commandant will review the packet to verify all requirements prior to scheduling a Master Instructor Selection Board. If the instructor meets the requirements (except for completion of the MIB), the NCOA commandant will-

(1) Schedule and conduct a Master Instructor Selection Board. For the first two years of this program, NCOAs will need to coordinate with INCOPD to ensure a representative from INCOPD is available for the board. Chapter 5 contains procedures for conducting the board.

(2) If the instructor is recommended for Master Instructor, add the completed MIB Recommendation (TF 600-21-3) to the packet, prepare the DA Form 4187 and process the action as described in paragraphs d-f above.

k. Upon receiving the approved packet, the NCOA will schedule and conduct an awards ceremony to recognize the achievement of the instructor. When feasible, NCOA commandants should try to include senior leaders (e.g. CoE Commanders, TRADOC Command Sergeant Major) in ceremonies to recognize instructors that achieve senior and master level recognition.

l. Ensure academy records regarding the status of instructor recognition are updated and any changes to instructor recognition status are reported to INCOPD quarterly.

Circle the appropriate copy designator

Copy 1   Copy 2   Copy 3   Copy 4

PERSONNEL ACTION

For use of this form, see AR 600-8-6 and DA PAM 600-8-21; the proponent agency is ODCSPER

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY:	Title 5, Section 3012; Title 10, USC, E.O. 9397.
PRINCIPAL PURPOSE:	Used by soldier in accordance with DA PAM 600-8-21 when requesting a personnel action on his/her own behalf (Section III).
ROUTINE USES:	To initiate the processing of a personnel action being requested by the soldier.
DISCLOSURE:	Voluntary. Failure to provide social security number may result in a delay or error in processing of the request for personnel action.

1. THRU (Include ZIP Code)	2. TO (Include ZIP Code) Commander, Artillery School ATTN: AAAA-AA 1000 Sill Boulevard Fort Sill, OK 11111	3. FROM (Include ZIP Code) Commandant, Fires NCOA 1000 Sill Boulevard Fort Sill, OK 11111

SECTION I - PERSONAL IDENTIFICATION

4. NAME (Last, First, MI) Smith, John R	5. GRADE OR RANK/PMOS/AOC SFC/13F	6. SOCIAL SECURITY NUMBER 111-11-1111

SECTION II - DUTY STATUS CHANGE (AR 600-8-6)

7. The above soldier's duty status is changed from _____ to

_____ effective _____ hours, _____ _____

SECTION III - REQUEST FOR PERSONNEL ACTION

8. I request the following action: (Check as appropriate)

	Service School (Enl only)		Special Forces Training/Assignment		Identification Card
	ROTC or Reserve Component Duty		On-the-Job Training (Enl only)		Identification Tags
	Volunteering For Oversea Service		Retesting in Army Personnel Tests		Separate Rations
	Ranger Training		Reassignment Married Army Couples		Leave - Excess/Advance/Outside CONUS
	Reassignment Extreme Family Problems		Reclassification		Change of Name/SSN/DOB
	Exchange Reassignment (Enl only)		Officer Candidate School	✓	Other (Specify)
	Airborne Training		Asgmt of Pers with Exceptional Family Members		Award of SAIB and PDSI B2A

9. SIGNATURE OF SOLDIER (When required)	10. DATE (YYYYMMDD)

SECTION IV - REMARKS (Applies to Sections II, III, and V) (Continue on separate sheet)

Soldier has completed the requirements for recognition as a NCOES Senior Instructor

1. Passed APFT: 3/4/2014
2. Passed Height/Weight: 3/4/2014
3. Completed TRADOC Instructor Certification: 6/10/2013
4. Completed 400 hours of instruction as the primary instructor since receiving BAIB recognition: 5/6/2014
5. Completed SGITC (or approved equivalent) 8/2/2013 and SATBC (or approved equivalent) 9/20/2013
6. Completed two successful observation for Senior Instructor Recognition: 6/6/2014 and 7/7/2014
7. Completed lesson redesign: 6/11/2014

Request award of Senior Instructor Badge and Personnel Development Skill Identifier (PDSI) B2A.

SECTION V - CERTIFICATION/APPROVAL/DISAPPROVAL

11. I certify that the duty status change (Section II) or that the request for personnel action (Section III) contained herein -

	HAS BEEN VERIFIED		RECOMMEND APPROVAL		RECOMMEND DISAPPROVAL	✓	IS APPROVED		IS DISAPPROVED

12. COMMANDER/AUTHORIZED REPRESENTATIVE Michael Smith, Brigadier General, Commanding	13. SIGNATURE	14. DATE (YYYYMMDD)

DA FORM 4187, JAN 2000   PREVIOUS EDITIONS ARE OBSOLETE   APD PE v1.02ES

Figure 4-2. Sample DA 4187

4-8. Instructor Recognition Waivers.

a. Soldiers will be allowed to earn the Instructor, Senior, and Master Instructor Badges without progressing through the levels as long as they have met all of the requirements for the recognition level until 10 July 2015. For example, an instructor has been teaching at an NCOA for 24 months and meets all of the requirements for the Senior Instructor Badge except they have not taught 400 hours of instruction since being awarded the Army Instructor Badge because the program is new. In this case, if the instructor can provide documentation to the commandant that they have served as the primary instructor for 480 hours (80 hours required for the Instructor recognition level plus 400 hours required for the Senior Instructor) recognition level since completing TR 350-70 instructor certification and they meet the other requirements for Instructor and Senior Instructor recognition, then they may be awarded the Senior Instructor Badge without having been awarded the Instructor Level Badge.

b. Soldiers seeking Master Instructor recognition during this period that have not been awarded the Instructor and Senior Instructor badges must provide documentation to the commandant that they served as the primary instructor for 880 hours of instruction (80 hours required for the Instructor level plus 400 hours required for Senior instructor level plus 400 hours required for the Master Instructor level) since completing TR 350-70 instructor certification and meet all of the other requirements for Instructor, Senior Instructor and Master Instructor recognition.

4-9. Rescinding Instructor Recognition.
Instructor badges may be revoked by the awarding authority if the recipient is removed from the instructor position for cause, regardless of the amount of time the individual has served in the position in a satisfactory manner. While serving in an instructor position, if a Soldier fails to meet, or falls below the minimum instructor observation score (Instructor: 24; Senior Instructor: 32; and Master Instructor: 40) during any six-month assessment period, they should be counseled and develop a plan to remediate performance. If the instructor continues to perform unsatisfactory over the next six months then action should be taken to rescind the instructor recognition badge. This mechanism will ensure that instructors that do not maintain their performance level do not continue to receive instructor recognition. Soldiers may appeal the rescinding action to the next level officer in the chain of command that is above the awarding authority.

Chapter 5
Master Instructor Selection Board

5-1. Selection Board.
NCOA commandants will conduct a Master Instructor Selection Board for Senior Instructors who seek recognition as Master Instructors. The culminating activity of the board will be an oral examination of the candidates' knowledge and application of the competencies.

5-2. Selection Board Observations.
Commandants must have a representative of INCOPD observe and advise the Master Instructor Selection Board in order to establish consistency across the academies. At the end of the two-year period, INCOPD will evaluate if it is necessary to continue to observe every board or only conduct periodic observations.

5-3 Master Instructor Board Procedures

    a. The Master Instructor Selection Board will be conducted, as required, by NCOA commandants. The NCOA commandant will serve as the board president and may be a voting or non-voting member.

    b. The Board President will appoint in writing, an odd number (at least three) of unbiased voting members and a recorder without a vote.

    c. Board membership will consist of the following:

      (1) Voting military members must be of equal or higher rank to those being considered for recognition. When feasible, the preference is voting members should be at least one rank senior to those being considered for recognition. Voting board members must have adequate knowledge and experience to judge the instructor's knowledge related to the instructor competencies in the IDRP. IDRP master instructors should serve as board members. If IDRP master instructors are not available, then other qualified military members or civil servants may serve as board members. Contractors may not serve as board members. Commandants have the discretion to determine which qualifications to use for the board members at their academy. See Table 5-1 for recommended board member qualifications.

Table 5-1
Recommended Master Instructor Board Member Qualifications

MIB Position	Qualified Personnel	Recommended Qualifications to Consider for Selecting Other Personnel
Board President	NCOA Commandant	N/A
Board Members	Master Instructor	Consider personnel with some of the following education and experiences: Soldiers • Have instructed for a minimum of two years, instructed two different courses, and are recognized by leaders and peers as an exemplary instructor. • Have an associate's degree or higher in the education field. • Have served more than one assignment as an instructor. • Have been recognized as an outstanding NCO through other recognition programs (Instructor of the Year, Audie Murphy Club). • Has conducted supervisor and student evaluations. Civilians • Have seven or more years of experience as an instructor. • Have met TRADOC 350-70 instructor certification requirements. • Have attended most of the courses required for recognition as an instructor, senior instructor and master instructor. • Have a Master's degree in education (preferably in adult learning, instructional design or educational psychology). • Understand IDRP program and the competencies. • Demonstrate a high level of knowledge about instruction and learning science. • Have experience evaluating instructors.
INCOPD Member	Learning Innovations and Initiatives Division Members	Soldiers and Civilians from INCOPD that: • Have met TRADOC 350-70 instructor certification requirements and instructed for a minimum of two years. • Have a Master's degree in education (preferably in adult learning, instructional design or educational psychology). • Have attended most of the courses required for recognition as an instructor, senior instructor and master instructor. • Understand IDRP program and the competencies. • Demonstrate a high level of knowledge about instruction and learning science. • Have experience evaluating instructors.

(2) For a period of two years from the implementation of the IDRP, at least one voting member will be an INCOPD representative.

(3) Whenever feasible, boards will consist of male and female members. At least one voting member will be the same gender as the Soldier being evaluated. When this is not possible, the reasons will be recorded as part of the board proceedings.

(4) Voting members will include a minority member if reasonably available.

(5) The non-voting member need not be senior in rank to the candidates.

d. Senior Instructors that seek the Master Instructor recognition must meet all of the other requirements for the Master Instructor recognition prior to attending the board.

e. Senior Instructors that seek the Master Instructor recognition can participate in the Master Instructor Selection Board from a remote location when necessary. For those candidates in the field or TDY, prior arrangements should be made for video conferencing or telephone connections.

f. The board members will use question and answer format only. Soldiers will not be required to perform hands-on tasks. Questions will focus on instructors' knowledge and experience related to the instructor competencies. The competencies are categorized into five domains: (1) Professional Foundations; (2) Planning and Preparation; (3) Instructional Methods and Strategies; (4) Assessment and Evaluation; and (5) Management. The oral examination should include questions from each of the domains to evaluate the candidate's proficiency in the competencies. Each voting member will select a domain and question the candidate's knowledge and experience in that specific domain. Word questions to give the nominee an opportunity to reflect on his/her experiences and knowledge and talk about how he/she applies the competencies in his/her professional career (instructor/Soldier) and personal life. Appendix K contains sample questions for each of the domains and associated competencies. All voting members will complete TF 600-21-2, Master Instructor Board Member Appraisal Worksheet for each Master Instructor candidate (see appendix J). They will score the candidates in Section 1, Areas of Evaluation and indicate whether they recommend or do not recommend the candidate for Master Instructor in Section 2.

g. Once a board is convened, the same board members will be present during the entire board proceedings.

h. The president will call the board to order and brief it on the following rules:

(1) Each voting member has one vote.

(2) Each voting member will score the candidates in Section 1, Areas of Evaluation: a, b and c of TRADOC Form 1022, Master Instructor Board Member Appraisal Worksheet (see Appendix J).

(3) Each voting member will score the candidates response to their specific questions in Section 1, Instructor Competency (d), Area of Evaluation of TRADOC Form 1022, Master Instructor Board Member Appraisal Worksheet

(4)   The recorder will record and tally the voting members' scores for each candidate on a Master Instructor Board Recommendation, TF 600-21-3, (see Appendix K).

(5) The board will identify candidates to be awarded recognition as a Master Instructor and a memorandum for record will be signed by the board president listing the candidates that met the requirements.

(i) The president of the board will inform candidates of the board's recommendation on the same day, within a reasonable time.

(j) The board will provide constructive feedback to candidates that were not recommended for Master Instructor recognition.

Chapter 6
Coaching

6-1. Instructor Coaching.
More experienced instructors foster the growth of less experienced instructors by providing guidance through counseling, coaching, and reflective problem solving. One of the greatest obstacles to overcome is time for classroom visits; observations and feedback conferences; training and follow-up activities. One option is to arrange for another instructor to substitute during non-critical classroom time so instructors are free to attend coaching activities. Your coaching support should be tailored to the capabilities within your organization and address any specific or unique instructor requirements in your environment.

6-2. Coaching Suggestions.
The list below is provided as suggestions for developing a coaching relationship with junior instructors.

a. Conduct an assessment of the instructor's current performance.

b. Help the instructor develop a self-development plan that both agree to.

c. Allocate time for coaching activities.

d. Discuss your expectations and outcomes.

e. Establish goals and plan to revise them as needed.

f. Discuss how you will evaluate your instructor. Allow your instructor to have a say in the process.

Appendix A
References

Section I
Required Publications

AR 600-8-19
Enlisted Promotions and Reductions

AR 600-8-22
Military Awards

AR 600-9
The Army Weight Control Program

AR 614-200
Enlisted Assignments and Utilization Management

AR 670-1
Wear and Appearance of Army Uniforms and Insignia

DA Pamphlet 611-21
Military Occupational Classification and Structure

TRADOC Regulation 350-70
Army Learning Policy and Systems

Section II
Related Publications

TRADOC Regulation 10-5-9
Institute for Noncommissioned Officer Professional Development and United States Army
Sergeants Major Academy

TRADOC Pamphlet 350-70-3
Staff and Faculty Development

TRADOC Pamphlet 525-8-2
Army Learning Concept for 2015

Section III
Prescribed Forms

TF 600-21-1
 Instructor Observation Rubric

TRADOC Regulation 600-21

TF 600-21-1
Master Instructor Board Member Appraisal Worksheet

TF 600-21-3
 Master Instructor Board Recommendation

Section IV
Referenced Forms

DA Form 1059
Service School Academic Evaluation Report

DA Form 2-1
Personnel Qualification Record, Part II

DA Form 21-66-8
Noncommissioned Officer Evaluation Report

DA Form 21-66-8-1
NCOER Counseling Form

DA Form 4856
Developmental Counseling Form

DA Form 705
APFT Scorecard

DA Form 2028
Recommended Changes to Publications and Blank Form

DA Form 4187
Personnel Action

DA From 5500
Body Fat Content Worksheet (Male)

DA Form 5501
Body Fat content Worksheet (Female)

ERB
Enlisted Record Brief

Appendix B
Instructor Application Packet

Phase I, Part I
Eligibility Requirements

Instructions: The applicant must complete and sign Part I and forward it along with the documents listed in Application Packet Checklist below. Incomplete packages will not be evaluated.

Applicant's Name_____ Date_____

Address_____

Phone _____ E-Mail_____

Instructor Position Sought_____

Application Packet Checklist

Item	
Enlisted Record Brief (ERB)	
Last three Noncommissioned Officer Evaluation Records (NCOER)	
Service School Academic Evaluation Report from last NCOES course attended.	
Letter of Intent	
Letter of Recommendation	

I have read and meet the requirements for this position in accordance with AR 600-214, Ch 6.

_____
  Signature

Phase I, Part II
Screening Worksheet

Instructions: The rater will evaluate the applicant's credentials on the criteria listed. When you finish rating the applicant, indicate whether the applicant met the initial eligibility criteria and should be scheduled for an interview. Use the back of this page for notes regarding the screening.

Applicant's Name:			
	YES	*NO*	*N/A*
Enlisted Record Brief (ERB)			
• Has completed the course for which applicant is applying to instruct			
• Rank is appropriate for the courses that will be taught			
• Has had appropriate assignments similar to the rank and military occupational specialty(ies) of the Soldiers he/she will teach			
Last three Noncommissioned Officer Evaluation Reports (NCOER)			
• Demonstrated moral character, values, professionalism consistent with the NCO creed			
• Demonstrated technical expertise			
• Demonstrated the ability to lead and care for Soldiers			
• Demonstrated commitment to developing Soldiers			
Service School Academic Evaluation Report			
• Exceeded or achieved course standards			
• Evaluated abilities were rated Superior or Satisfactory			
• Comments demonstrate professional excellence or potential to serve as an instructor			
Letter of Intent			
• Shows motivation/enthusiasm for teaching			
• Communicates effectively			
• Appears to be original writing			
Letter of Recommendation			
• Good character reference			
• Regarded as an excellent candidate for instructor position			
• Cites positive observations of applicant conducting training and developing Soldiers			
Applicant Is already qualified as an instructor			
• Meets the standards of initial eligibility			
• Does not meet standards of initial eligibility			
Recommendation			
• The applicant is qualified and should be scheduled for an interview			
• The applicant is unqualified			

NCOA Rater_____ Date_____

Phone_____ E-Mail_____

Appendix C
TQI-M Instructor Interview Protocol

Phase II, Instructor Interview Protocol

The TQI-M Instructor Interview Protocol contains 12 areas for interviewers to rate an applicant's responses during the interview. For each area there are multiple questions/prompt options. Interviewers should only select one question/prompt option from each area to ask the applicant. The interview questions/prompt options and scoring rubrics in Phase II are intended to assess quality indicators that research recognizes as indicators of effective instructors.

The interview questions/prompt options are organized in five categories:1) *Instructor as a Person (Areas 1,8, and 11);* 2) *Classroom Management and Organization*, (Areas 2 and 5); 3) *Planning for Instruction*, (Areas 3 and 6); 4) I*mplementing Instruction*, (Areas 4, 9 and 10); and 5) *Monitoring Student Progress and Potential (Areas 7 and 12).* Within each area are multiple questions/prompt options, sample quality indicators the questions should elicit, and a scoring rubric that you should use to determine the quality of the Soldier's response.

The interview should consist of twelve questions. The applicant's response to each question can be rated as 0, 1, 2, or 3 points. The maximum score an applicant can receive is 36 points. Your interview team should select the question(s)/prompt options from each area you intend to ask based on your academy's preferences and any specific course requirements this position demands. Ask the same questions of all applicants interviewing for the same position. The interview team should be familiar with the rubric and have practiced using it so that team members share a common understanding and interpretation of the rubric.

Immediately after the Soldier responds, score the response by checking the box next to the term that best describes the applicants answer (*Unsatisfactory, Developing, Proficient or Exemplary*). When the interview is concluded, convert the ratings into points and write the number of points on the cover sheet beside the area number. Total each entry for an overall rating total. Conclude the interview by: (1) asking if the applicant has any questions; (2) let the applicant know when he or she is likely to hear from the school again; and (3) thank the applicant for his time.

Applicants will score at different levels in instructor skills. Soldiers that have not been instructors are likely to score in the "developing" range on the rubric with a few "proficient" ratings. These applicants are likely promising instructors. Carefully consider applicants who are experienced instructors and score primarily in the "developing" range. Their score may indicate they are not strong candidates for the position.

Teacher Quality Index-Military (TQI-M) Instructor Interview Protocol

Applicant's Name: _____   Date: _____

Instructor Position Sought: _____   Time: _____

Scoring Summary   **Interviewer:**

Convert ratings into points, and write the number of points in the blank beside the area number.

(Unsatisfactory = 0; Developing = 1; Proficient = 2; Exemplary = 3)

Then, add the numbers to get a subtotal for the quality category. Finally, sum the subtotals to get an overall rating. The maximum score is 36 points.

Quality Category		Area Prompts		
Instructor As a Person	A1 ____ +	A8 ____ +	A11 ____ =	__ __
Classroom Management and Organization		A2 ____ +	A5 ____ =	__ __
Planning for Instruction		A3 ____ +	A6 ____ =	__ __
Implementing Instruction	A4 ____ +	A9 ____ +	A10 ____ =	__ __
Monitoring Student Progress and Potential		A7 ____ +	A12 ____ =	__ __
			Overall Rating Total	__ __

Directions

This interview contains 12 areas for interviewers to rate an applicant's responses given during the interview. For each area, there are multiple prompt options. Select one prompt from each area to ask the applicant. Indicate your selection by checking the box. Only ask one prompt option for each area.

Immediately after the applicant has responded, score the response by placing a "X" in the box next to the term that best describes the quality of the applicant's response. At the conclusion of the interview, the ratings will be entered in the summary box above.

1. Instructor As a Person

Prompt Options
☐ **Share with me why you are interested in being an instructor at this time.**
☐ **When people ask you why you want to be an instructor, what do you tell them?**
☐ **With all the challenges of instructing, why do you want to become an instructor?**

Sample Quality Indicators
- Displays enthusiasm for learning/subject matter
- Interacts with students
- Possesses a high level of motivation

Notes

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant does not clearly communicate or provide concrete examples.	The applicant clearly communicates a broad idea, but the response lacks specifics.	The applicant communicates with clarity and gives some examples (e.g., concrete and abstract).	The applicant effectively communicates with individuals about his/her passion/dedication to the profession using examples.

2. Classroom Management and Organization

Prompt Options
☐ **Tell me what you might do with Soldiers during the first few days/weeks of the course to establish a positive classroom environment.**
☐ **Share with me what you might do to foster a positive and productive classroom climate.**
☐ **Share with me how you ensure that everyone feels included in the activity you are directing.**

Sample Quality Indicators
- Establishes clear rules and routines
- Gets to know the Soldiers
- Offers opportunities for Soldiers to be successful with the classroom guidelines

Notes

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant shares classroom operating procedures during the first week of the course but does not give examples of how he or she builds rapport with Soldiers or reinforces the classroom guidelines.	The applicant shares classroom operating procedures with Soldiers but offers limited opportunities for Soldiers to practice the routines and be successful following the rules after the initial introduction.	The applicant spends more time in the beginning weeks of the course establishing routines and reinforcing the rules so that Soldiers know what is expected of them.	The applicant builds a classroom community by providing opportunities for Soldiers to take responsibility and have ownership of the classroom.

3. *Planning for Instruction*

Prompt Options
- ☐ **Share with me what you might consider with long- and short-term planning for training.**
- ☐ **Think about training that you conducted, and describe how you planned for it.**
- ☐ **Share with me what you considered when you planned for a training session to be conducted.**

Sample Quality Indicators
- Sequences contents
- Relates concepts to prior knowledge
- States training objectives and identifies activities aligned to them

Notes

☐ **Unsatisfactory** 0 points	☐ **Developing** 1 point	☐ **Proficient** 2 points	☐ **Exemplary** 3 points *In addition to meeting the Proficient criteria:*
The applicant does not make long-range plans to maximize the instructional time during the course.	The applicant does long- and short-range planning, but treats them as isolated planning functions.	The applicant reinforces his/her focus on instruction through allocation of time to address all curriculum objectives by consolidating isolated facts into broader concepts.	The applicant consistently prioritizes instruction by aligning the short-term plans to the long-range plans in order to relate facts and broad concepts to prior and future instruction.

4. *Implementing Instruction*

Prompt Options

- ☐ **Think about effective training you have conducted or have been involved in. Tell me how Soldiers were engaged and involved in their learning.**
- ☐ **Think about effective training you have conducted or have been involved in. Describe how all Soldiers were involved in their learning.**
- ☐ **Describe a situation where you have dealt with an unmotivated Soldier during a training event. Tell me what you did, and how it worked.**

Sample Quality Indicators
- Solicits Soldiers' comments and questions
- Uses a variety of hands-on/minds-on activities
- Monitors Soldiers' understanding and adjusts lesson pacing or activitie*s*

Notes

☐ **Unsatisfactory** 0 points	☐ **Developing** 1 point	☐ **Proficient** 2 points	☐ **Exemplary** 3 points *In addition to meeting the Proficient criteria:*
The applicant makes little/no changes in activities to meet the needs of Soldiers or to enhance engagement.	The applicant makes minor changes in activities to meet the changing needs and interests of Soldiers and to enhance engagement.	The applicant modifies activities to address the changing needs of Soldiers and to enhance their active engagement.	The applicant systematically designs activities for different Soldiers and achieves high levels of active engagement.

5. *Classroom Management and Organization*

Prompt Options

☐ **Tell me about a frustrating situation involving a Soldier's actions and how you resolved it.**

☐ **Tell me about a Soldier who continually insubordinate and what you did to address this pattern of behavior.**

☐ **Share with me a time when you had difficulty with a particular Soldier's behavior and what you did to address it.**

☐ **Share with me an experience dealing with discipline that you were not prepared for. What did you do, and what would you do differently now?**

Sample Quality Indicators
- Communicates rules
- Demonstrates respect for Soldiers
- Monitors behavior and provides feedback
- Involves course personnel in identifying solutions as appropriate

Notes
_____
_____
_____

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant does not communicate clear expectations for behavior to Soldiers. Responds primarily with punitive measures.	The applicant inconsistently communicates expectations for behavior and is primarily reactive.	The applicant communicates clear expectations about behavior to Soldiers. Sensitively inquires if there is anything the instructor should know that might help the situation.	The applicant communicates clear expectations for behavior and helps Soldiers meet those expectations in a positive and constructive manner. Seeks to create win-win situations by involving appropriate people in supporting the Soldier in making more positive behavioral choices.

6. *Planning for Instruction*

Prompt Options

☐ **Think about training you have conducted. Tell me why you selected particular training methods as part of that training.**

☐ **Describe the key components in training you have conducted beginning with the lesson plan and moving through student testing.**

Sample Quality Indicators
- Uses a range of strategies
- Identifies the available resources
- Selects problem-solving, hands-on, and interactive strategies and resources

Notes
_____
_____
_____

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant does not vary his/her narrow set of instructional strategies.	The applicant uses a limited number of instructional strategies with limited attempts to appeal to Soldier needs or interests.	The applicant uses a variety of instructional strategies that appeal to the interests of different Soldiers.	The applicant diagnostically uses a wide range of instructional strategies to enhance Soldier understanding of concepts.

7. *Monitoring Student Progress and Potential*

Prompt Options

☐ **Think about a time when you conducted or participated in training in which Soldiers were having difficulty. What did you do or what did the instructor do to increase understanding?**

☐ **Think about a time when you conducted or participated in training in which Soldiers were having difficulty. How was instruction modified so that struggling Soldiers understood the lesson?**

☐ **What can you do to increase understanding when Soldiers are having difficulty understanding concepts or materials?**

Sample Quality Indicators
- Holds Soldiers individually accountable
- Considers Soldiers' learning needs

Notes

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant uses limited assessment strategies, assesses infrequently, does not use baseline or feedback data to make instructional decisions.	The applicant uses a limited selection of assessment strategies, inconsistently links assessment to intended learning outcomes, and/or does not use assessment to plan/modify instruction.	The applicant systematically gathers, analyzes, and uses all relevant data to measure Soldier academic progress, guide instructional content and delivery methods, and provide timely feedback to Soldiers throughout the course.	The applicant uses a variety of informal and formal assessments based on intended learning outcomes to assess Soldier learning and teaches Soldiers how to monitor their own academic progress.

8. *Instructor As a Person*

Prompt Options

☐ **Give me an example of how you would establish and maintain rapport with your Soldiers.**

☐ **How can you get to know your Soldiers and build trust with them?**

Sample Quality Indicators
- Knows Soldiers' interests
- Uses humor
- Interacts in more informal settings (e.g., day room, dining facility, motor pool)

Notes

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant shares examples that are uncaring and/or distant with regard to Soldier interactions.	The applicant focuses on establishing a instructor-Soldier rapport with clear boundaries.	The applicant is caring with his or her Soldiers and provides examples within the instructional environment (e.g., room, dining facility, motor pool) demonstrating that he or she is interested in the Soldiers as individuals.	The applicant provides clear examples of interactions with Soldiers in the instructional environment (e.g., day room, dining facility, motor pool) and outside of the instructional environment (e.g., community, PX, church).

9. *Implementing Instruction*

Prompt Options
☐ **How would you use technology during your training instruction?**
☐ **Describe how you would plan and design learning experiences to encourage Soldiers to use appropriate technology.**
☐ **Describe how you would encourage Soldiers to use technology to enhance their learning.**

Sample Quality Indicators   *Notes*
- Creates tasks to increase Soldiers' proficiency with technology
- Considers technology as a broad term, not limited to computers
- Integrates technology into meaningful lessons

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant indicates a lack of knowledge and/or competence in using technology.	The applicant has limited integration between technology and authentic Soldier work.	The applicant uses the available technology as appropriate to instructional objectives to increase Soldiers' proficiency with the technology/technology application.	The applicant offers examples of how technology is integrated into lessons in order to increase Soldiers' understanding of the content as well as encourage their decision-making of how to use technology appropriately.

10. *Implementing Instruction*

Prompt Options
☐ **Pick a topic in your military occupational specialty that is often difficult for inexperienced Soldiers to understand. Tell me what the topic is and how you would explain it to them. Also, share with me directions for an activity you would do to help further their understanding of that topic.**
☐ **Tell me about a training activity you taught or participated in that went very well. Give me a sample of the directions that were given for the activity involved in the lesson.**
☐ **Take a moment to think about how to do an activity related to the topic of _____** *(the interviewer should pre-select an appropriate topic),* **describe the activity to be done and tell me the directions Soldiers would need to complete the learning activity.**

Notes

Sample Quality Indicators
- Provides a clear example with step-by-step directions
- Uses multiple learning modalities
- Selects an example appropriate to the content area

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Basic criteria:*
The applicant gives a confusing example and/or directions.	The applicant provides an inadequate answer; however, it does demonstrate some knowledge.	The applicant gives a clear example with opportunities for guided practice as well as targeted instruction for Soldiers needing more support.	The applicant clearly articulates the problem area with the topic and provides a clear example that is followed by a plan of how to meet individual needs of Soldiers who require more assistance.

11. *Instructor As a Person*

Prompt Options

☐ **Think about a time when you conducted or participated in training in which Soldiers were having difficulty. What did you do or what did the instructor do to increase understanding?**

☐ **Tell me what you consider when you think about an event, lesson, or activity you have conducted with Soldiers that, despite planning and preparation, could have gone better.**

☐ **Tell me how you might reflect on your professional practice as an instructor.**

Sample Quality Indicators

- Identifies strengths and weaknesses
- Targets efforts for change/revision
- Demonstrates a high sense of efficacy

Notes

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant focuses on management-related issues without consideration of instructionally-related issues.	The applicant addresses instructional and/or curricular issues in a limited fashion with minimal reflection.	The applicant reflects on his/her work both formally and informally in order to improve his/her teaching and the Soldiers' learning.	The applicant consistently reflects on his/her work, seeks outside counsel from appropriate sources, and strives to identify ways to improve the learning experience for Soldiers.

12. *Monitoring Student Progress & Potential*

Prompt Options

☐ **Think about a time when you conducted training or participated in training when a large number of Soldier s performed poorly on a formal assessment. What did you do or what was done as a result of the poor Soldier performance?**

☐ **Think about a time when you conducted training when you had to seriously consider what to do after several Soldiers did not perform satisfactorily on a test. Describe the situation, your actions, and the subsequent outcome.**

Sample Quality Indicators

- *Identifies instructor as responsible for Soldier learning*
- *Identifies* instruction and assessment as possible sources for failure
- *Identifies corrective measures*

Notes

☐ **Unsatisfactory** **0 points**	☐ **Developing** **1 point**	☐ **Proficient** **2 points**	☐ **Exemplary** **3 points** *In addition to meeting the Proficient criteria:*
The applicant places responsibility for Soldier achievement on Soldier and takes little to no personal responsibility.	The applicant recognizes that a problem exists but does not re-teach or reassess.	The applicant identifies self as integral component in teaching and learning. Identifies some strategies for addressing poor performance.	The applicant clearly identifies possible sources for poor Soldier performance and appropriately aligns corrective measures.

Additional Information:

_____

_____

_____

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Appendix D
Instructor Competency and Outcomes Matrix

Table D-1
Instructor Competencies and Outcomes

Outcomes			
Competency	**Instructor is able to:**	**Senior Instructor is able to:**	**Master Instructor is able to:**
1. Communicate Effectively	use a variety of appropriate written, oral, and body language, and active listening skills to communicate clearly. Acknowledge diverse perspectives and use language that is effective for the learning content and audience.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
2. Update & improve one's professional knowledge & skills	assess their own instructional performance and identify areas for improvement; uses mentoring sessions and developmental activities to continuously improve performance.	develop a personal development plan that includes training, college, self -development, to increase knowledge of topics related to learning; demonstrate an interest in becoming a learning professional; mentor Instructors.	mentor senior instructors; prepare and conduct training for Basic and Sr Instructors; actively pursue expertise as learning professional; serve on Master Instructor Selection Board.
3. Comply with established ethical & legal standards	exhibit Army values and professional standards; avoid violating copyright law; respect student confidentiality, anonymity and rights; and avoid real or perceived conflicts of interest.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
4. Establish & maintain professional credibility	be a role model for success by: maintaining subject matter expertise, demonstrating knowledge of adult learner traits and behaviors; respecting the opinions of students, peers and seniors; seeking self-improvement.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
5. Plan instructional methods & materials	N/A at this level	use instructional design principles to modify/redesign instruction; modify/create technology-based instructional resources.	design new lessons using appropriate design principles, instructional strategies, delivery methods, and instructional technology; review and approve lesson revisions by Senior Instructors.

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Table D-1
Instructor Competencies and Outcomes, continued

	Outcomes		
Competency	Instructor is able to:	Senior Instructor is able to:	Master Instructor is able to:
6. Prepare for Instruction	anticipate student needs; identify potential questions and difficult subject matter; prepare key points, examples, and additional information for students; confirm availability and readiness of learning environment including physical space, materials, safety, etc...	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
7. Stimulate & sustain learner motivation & engagement	establish relevance of instruction; provide clear goals and realistic expectations; exhibit enthusiasm for learning content, provide opportunities for learners to succeed and supportive feedback to reinforce value of training.	diagnose motivation problems in individuals or teams and provide probable solutions.	*Note: Master instructors continue to assess and develop this competency; however, defining another level of this competency may not be necessary.*
8. Demonstrate effective presentation skills	focus presentation on key learning points and present content in a variety of ways; recognize and adapt presentations to learner needs; use familiar examples, anecdotes, stories, and analogies effectively; demonstrate required student performance.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
9. Demonstrate effective facilitation skills.	elicit questions and contributions from the students, promotes interaction with and between students, stays focused on learning objectives, monitors, assesses and adapts instruction to classroom dynamics.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
10. Demonstrate effective questioning skills	use preplanned questions and questioning techniques to assess learning and stimulate discussion; use active listening to respond to student questions; assess student learning; provide supportive comments and ask appropriate follow-up questions.	develop questions that promote deeper thinking; use redirect questions to promote learning; create appropriate questions on the fly as learning occurs.	*Note: Master Instructors continue to assess and develop this competency; however, defining another level of this competency may not be necessary.*

Table D-1
Instructor Competencies and Outcomes, continued

Outcomes			
Competency	Instructor is able to:	Senior Instructor is able to:	Master Instructor is able to:
11. Provide clarification & feedback	provide students opportunities to ask questions; provide specific, relevant , timely, fair, supportive, balanced and reinforcing feedback that focuses on performance. Encourage students to give peer feedback.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
12. Promote retention of knowledge & skills	activate student prior knowledge or experiences and relate new content to what students already know; provide opportunities to practice and apply new knowledge or skills; provide activities for reflection and review.	promote student development and use of self-learning skills.	*Note: Master Instructors continue to assess and develop this competency; however, defining another level of this competency may not be necessary.*
13. Promote transfer of knowledge & skills	cause students to use new knowledge or skills, to solve realistic problems; provide opportunities for students discussion or reflection about how they can use new knowledge or skills when they return to work.	cause students to practice the new knowledge or skill in more complex scenarios; provide opportunity for learners to create, invent or explore new ways to use the knowledge and skill.	*Note: Master Instructors continue to assess and develop this competency; however, defining another level of this competency may not be necessary.*
14. Use media and technology to enhance learning and performance	use planned media and technology appropriately to enhance learning and performance; troubleshoot or fix minor technical problems.	adjust use of media and technology appropriately to enhance learning; recommend ways to use technology to enhance lesson effectiveness.	evaluate if emerging educational technology can be used to enhance lesson effectiveness.
15. Assess learning and performance	communicate assessment criteria and instructions to students; monitor student learning though informal and formal assessments; administer and grade assessments.	develop basic assessment items.	develop complex assessment items and assessment instruments; suggest changes to the Individual Student Assessment Plan.
16. Evaluate instructional effectiveness	make recommendations to improve the learning (e.g. content, media changes); administer and interpret student reaction surveys.	use assessment data to recommend assessment item or lesson changes; assess performance of Instructors	evaluate the impact on learning of all elements within the learning environment and recommend changes to improve learning efficiency and effectiveness.
17. Manage an environment that fosters learning & performance	supervise the instructional setting to facilitate learning and improve performance; handle student disciplinary issues.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	

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Table D-1
Instructor Competencies and Outcomes, continued

	Outcomes		
Competency	**Instructor is able to:**	**Senior Instructor is able to:**	**Master Instructor is able to:**
18. Manage the instructional process through the appropriate use of technology	use technology effectively to complete administrative and instructional support requirements.	*Note: Senior and Master Instructors continue to assess and develop this competency; however, defining higher levels of this competency may not be necessary.*	
19. Counsel students	plan, and conduct student performance and event counseling; prepare and administer academic evaluations.	review academic evaluations and recommend changes.	develop basic and senior instructors counseling skills.

Appendix E
Instructor Training Matrix

Table E-1 below displays some of the training that is available to achieve the outcomes for each competency. Training listed in the table is not meant to be a comprehensive list of available courses; rather they are recommendations to assist the Soldiers and leaders consider what training may help improve their performance in each of the competencies. The items in bold text are training that is available from the Army; courses and workshops from commercial sources are in plain text; colleges' courses/topics are shown in italicized text; and for quick reference the mandatory training requirements at each level are underlined.

The remainder of the training plan is provided as a guide for instructors to self-select (in conjunction with their supervisory chain) the learning they need to continue their development. Since this table is not an exhaustive list of resources, organizations will need to share with one another information about the instructor training they are developing and executing. The CP-32 Army Civilian Training, Education, and Development System Plan at http://www-tradoc.army.mil/g357/cp32/acteds/planning/planning.html is another resource that lists training and education for professional development.

In conjunction with the INCOPD College of the American Soldier Program, INCOPD has begun an initial investigation of degree programs related to education that may also improve instructor performance. We envision the creation of a program where Soldiers receive maximum credit for Army courses (e.g. ABIC, SGITC) and have a path to obtain an education related degree that will improve their performance as instructors while also giving them credentials that they may use in transitioning to civilian life after they leave the Army.

Table E-1
Instructor Training and Education Plan

Recommended Training			
Competency	**Instructor**	**Senior Instructor**	**Master Instructor**
1. Communicate Effectively	**ABIC/FIFC**, **AIM** Instructional Techniques for New Instructors *Speech, Communications*	**AIM,** How to Become a Better Communicator *Interpersonal Communication*	*Professional Communications & Presentations*
2. Update & improve one's professional knowledge & skills	**AIM** Self-Assessment Workshop (New) *Self -Awareness & Personality Traits*	<u>**SATBC/FTDC or TRADOC approved equivalent**</u>**, AIM** Advanced Instructional Techniques Workshop **TQI-M**	Certified Facilitator Program *Principles and Methods of Learning; Learning Theory, Critical Thinking*
3. Comply with established ethical & legal standards	**ABIC/FIFC**, *Ethics in Today's Organization, Crash Course in Copyright*	Copyright and Privacy Guidelines for Recording Lectures	An Interactive Tutorial from The Center for Intellectual Property

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Table E-1
Instructor Training and Education Plan, continued

Recommended Training			
Competency	**Instructor**	**Senior Instructor**	**Master Instructor**
4. Establish & maintain professional credibility	**ABIC/FIFC**, How Adults Learn	**Training and Education Middle Manager's Course** Essentials of Adult Learning	**Senior Training and Education Management Course** *Learning Theory, Psychology of Learning, Team Management*
5. Plan instructional methods & materials	**ABIC/FIFC***, **AIM**, **SATBC/IFSC**	<u>**SGITC/IFSC, SATBC, or TRADOC approved equivalent,**</u> **DL Checklist Workshop** *Computers in Education*	How to Plan, Develop and Evaluate Training Scenario-based Learning *Instructional Design Practices, Instructional Product Development*
6. Prepare for Instruction	**ABIC/FIFC***, **SGITC/IFSC** How Adults Learn	*Computers in Education*	How to Plan, Develop and Evaluate Training
7. Stimulate & sustain learner motivation & engagement	**SGITC/IFSC, AIM** Essentials of Adult Learning	*Characteristics of the Adult Learner*	
8. Demonstrate effective presentation skills	**ABIC/FIFC**, **AIM**, **SGITC/IFSC**	<u>**SGITC/ IFSC or TRADOC approved equivalent,**</u> **AFSC or FDP1** Mastering the Art of Instructor Lead Training *Professional Communications and Presentations*	NA
9. Demonstrate effective facilitation skills.	**ABIC/FIFC**, **AIM**, **SGITC/IFSC**	<u>**SGITC/IFSC or TRADOC approved equivalent;**</u> **AFSC or FDP1** Facilitating for Excellence	*Organizational Behavior*
10. Demonstrate effective questioning skills	**ABIC/FIFC**, **SGITC/IFSC**	**TQI-M** The Art of Questioning AFSC or FDP1	Effective Classroom Training Techniques
11. Provide clarification & feedback	**SGITC/IFSC**	See competency 1. Communicate effectively for courses that contribute to this competency	
12. Promote retention of knowledge & skills	**ABIC/FIFC,**	**AFSC or TRADOC approved equivalent**	*Teaching Methods for Adult Learning*

Table E-1
Instructor Training and Education Plan, continued

Recommended Training			
Competency	**Instructor**	**Senior Instructor**	**Master Instructor**
13. Promote transfer of knowledge & skills	**ABIC/FIFC**	<u>**SGITC/IFSC or TRADOC approved equivalent**</u> Essentials of Learning Transfer	*Teaching Methods for Adult Learning*
14. Use media and technology to enhance learning and performance	As needed: **Video Teletraining Instructor Training Course/SdLIC, Blackboard, AdLIC, Modeling & Simulation Course**	Online Teaching and Training Web-based Training	Leveraging the Virtual Classroom *Management of Information Systems Analysis*
15. Assess learning and performance	**ABIC/FIFC**	**TQI-M** Tests and Measurements Course	*Assessment and Evaluation of Adult Education* **Instructor Evaluation Training**
16. Evaluate instructional effectiveness	**ABIC/FIFC, SGITC/IFSC**	Evaluating Instructors Workshop	**Quality Assurance Evaluator's Course** *Research Techniques, Assessment and Evaluation of Adult Education*
17. Manage an environment that fosters learning & performance	**ABIC/FIFC, SGITC/IFSC**	**AdLIC; SdLIC**	Principles and Practices of Performance Improvement
18. Manage the instructional process through the appropriate use of technology	**AdLIC, Video Teletraining Instructor Training Course /SdLIC, Blackboard, AIM**	Microsoft Office training	*Management of Information Systems Analysis*
19. Counsel students	*Basic counseling skills should have been learned through NCOES; further analysis may be necessary to determine if that training is sufficient.*	**Coaches Workshop (Ft Huachuca, SFDD)**	

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Appendix F
Instructor Competency Assessment Matrix

Table F-1
Competency Assessment Matrix

Instruments/Items to Assess Competencies			
Competency	**Basic**	**Senior**	**Master**
1. Communicate Effectively	Student questionnaires Instructor Observation Rubric,13 Instructor Self - Assessment, 1-4	Student questionnaires Instructor Observation Rubric, 13 Instructor Self-Assessment 1-4	Student questionnaires Instructor Observation Rubric, 13 Instructor Self-Assessment 1-4 Master Instructor Selection Board (MISB)
2. Update & improve one's professional knowledge & skills	Completion of Self-development plan Instructor Self -Assessment , 5,6	Completion of Self-development plan Mentorship of instructors Instructor Self -Assessment , 5,6	Completion of Self-development plan Completion of training events for other instructors Mentorship of Senior Instructors Instructor Self -Assessment , 5,6 Master Instructor Selection Board (MISB)
3. Comply with established ethical & legal standards	Student questionnaires Instructor Observation Rubric, 16 Instructor Self - Assessment, 7-9	Student questionnaires Instructor Observation Rubric, 16 Instructor Self - Assessment, 7-9	Student questionnaires Instructor Observation Rubric, 16 Instructor Self -Assessment, 7-9 Master Instructor Selection Board (MISB)
4. Establish & maintain professional credibility	Student questionnaires Instructor Observation Rubric, 15 Instructor Self -Assessment 10-12	Student questionnaires Instructor Observation Rubric, 15 Instructor Self -Assessment 10-12	Student questionnaires Instructor Observation Rubric, 15 Instructor Self -Assessment 10-12 Master Instructor Selection Board (MISB)
5. Plan instructional methods & materials	N/A at this level	Course/Lesson Design Checklist Instructor Self - Assessment, 16	Instructor Observation Rubric, 12 Master Instructor Selection Board (MISB) Instructor Self -Assessment, 16
6. Prepare for Instruction	Instructor Observation Rubric, 12 Instructor Self - Assessment, 13-15	Instructor Observation Rubric, 12 Instructor Self - Assessment, 13-15	Instructor Observation Rubric, 12 Instructor Self -Assessment, 13-15 Master Instructor Selection Board (MISB)

Table F-1
Competency Assessment Matrix, continued

Instruments/Items to Assess Competencies			
Competency	Basic	Senior	Master
7. Stimulate & sustain learner motivation & engagement	Student questionnaires Instructor Observation Rubric, 1,3 Instructor Self - Assessment, 17-19	Student questionnaires Instructor Observation Rubric, 1,3 Instructor Self - Assessment 17-19	Student questionnaires Instructor Observation Rubric, 1,3 Master Instructor Selection Board (MISB) Instructor Self - Assessment 17-19
8. Demonstrate effective presentation skills	Student questionnaires Instructor Observation Rubric, 3,4,6 Instructor Self - Assessment, 20-21	Student questionnaires Instructor Observation Rubric, 3,4,6 Instructor Self - Assessment, 20-21	Student questionnaires Instructor Observation Rubric, 3,4,6 Master Instructor Selection Board (MISB) Instructor Self - Assessment, 20-21
9. Demonstrate effective facilitation skills.	Student questionnaires Instructor Observation Rubric, 3,4,6 Instructor Self - Assessment, 21-23	Student questionnaires Instructor Observation Rubric, 3,4,6 Instructor Self - Assessment, 21-23	Student questionnaires Instructor Observation Rubric, 3,4,6 Master Instructor Selection Board (MISB) Instructor Self - Assessment, 21-23
10. Demonstrate effective questioning skills	Student questionnaires Instructor Observation Rubric, 5 Instructor Self - Assessment, 24-26	Student questionnaires Instructor Observation Rubric,5 Instructor Self - Assessment, 24-26	Student questionnaires Instructor Observation Rubric, 5 Master Instructor Selection Board (MISB) Instructor Self - Assessment, 24-26
11. Provide clarification & feedback	Student questionnaires Instructor Observation Rubric,8 Instructor Self - Assessment, 27-30	Student questionnaires Instructor Observation Rubric,8 Instructor Self - Assessment, 27-30	Student questionnaires Instructor Observation Rubric,8 Master Instructor Selection Board (MISB) Instructor Self - Assessment, 27-30
12. Promote retention of knowledge & skills	Student questionnaires Instructor Observation Rubric, 3,7 Instructor Self - Assessment, 31-34	Student questionnaires Instructor Observation Rubric, 3,7 Instructor Self - Assessment, 31-34	Student questionnaires Instructor Observation Rubric, 3,7 Master Instructor Selection Board (MISB) Instructor Self - Assessment, 31-34
13. Promote transfer of knowledge & skills	Student questionnaires Instructor Observation Rubric, 7, 10 Instructor Self - Assessment, 35	Student questionnaires Instructor Observation Rubric, 7,10 Instructor Self - Assessment, 35	Student questionnaires Instructor Observation Rubric, 7,10 Master Instructor Selection Board (MISB) Instructor Self - Assessment, 35
14. Use media and technology to enhance learning and performance	Student questionnaires Instructor Observation Rubric, 11 Instructor Self - Assessment, 36-38	Student questionnaires Instructor Observation Rubric, 11 Instructor Self - Assessment, 36-38	Student questionnaires Instructor Observation Rubric, 11 Instructor Self - Assessment, 36-38Master Instructor Selection Board (MISB)

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Table F-1
Competency Assessment Matrix, continued

Instruments/Items to Assess Competencies			
Competency	Basic	Senior	Master
15. Assess learning and performance	Student questionnaires Instructor Observation Rubric, 2,9 Instructor Self -Assessment, 39-43	Student questionnaires Instructor Observation Rubric, 9 Instructor Self -Assessment, 39-43	Instructor Self -Assessment, 39-43 Master Instructor Selection Board (MISB)
16. Evaluate instructional effectiveness	Student Questionnaires Instructor Self -Assessment, 44-48	Student Questionnaires Instructor Self -Assessment, 44-48	Student Questionnaires Master Instructor Selection Board (MISB) Instructor Self -Assessment, 44-48
17. Manage an environment that fosters learning & performance	Student questionnaires Instructor Observation Rubric, 14 Instructor Self -Assessment, 49-52	Student questionnaires Instructor Observation Rubric, 14 Instructor Self -Assessment, 49-52	Student questionnaires Instructor Observation Rubric, 14 Master Instructor Selection Board (MISB) Instructor Self -Assessment, 49-52
18. Manage the instructional process through the appropriate use of technology	Instructor Observation Rubric, 11 Instructor Self -Assessment, 53	Instructor Observation Rubric, 11 Instructor Self -Assessment, 53	Instructor Observation Rubric, 11 Master Instructor Selection Board (MISB) Instructor Self -Assessment, 53
19. Counsel students	Student questionnaires Student counseling forms Academic Evaluation Reports Instructor Self -Assessment, 54-58	Student questionnaires Student counseling forms Academic Evaluation Reports Instructor Self -Assessment, 54-58	Student questionnaires Student counseling forms Academic Evaluation Reports Master Instructor Selection Board (MISB) Instructor Self -Assessment, 54-58

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Appendix G
Instructor Self-Assessment

The Instructor Self -Assessment Tool is not intended for use as part of the instructor's formal evaluation. The intent of this tool is to provide the instructor with performance measures to assess his/her strengths and weaknesses in the competencies and guide him/her in planning activities necessary for self -improvement. Use the 'Strongly Disagree' rating scale to indicate if you do not perform the action at all; 'Disagree' if it is performed incorrectly or incompletely; 'Agree' if you perform it satisfactorily and 'Strongly Agree' if you perform it with proficiency/skill. Place a check mark under the appropriate rating that reflects your performance.

Date:

	Strongly Disagree	Disagree	Agree	Strongly Agree
Professional Foundations				
1. I use appropriate verbal and non-verbal language for my audience.				
2. I paraphrase student comments to show I understand them.				
3. I seek and acknowledge different perspectives.				
4. I use technology appropriately to communicate.				
5. I have a sincere enthusiasm for learning that shows in the classroom.				
6. I understand and update my knowledge.				
7. I am respectful and fair in my responses.				
8. I show respect for the students' right to privacy.				
9. I always respect intellectual property rights (trademarks, designs, copyrights for drawings, videos, articles, etc).				
10. I am an expert in the subject matter I teach.				
11. I participate in professional development activities.				
12. I always act in a professional manner.				
Preparing and Planning				
13. I thoroughly plan and coordinate resources (equipment, personnel, course materials) before the start of my class.				
14. I thoroughly plan and prepare my lessons.				
15. I make instructional resources available to all learners.				
16. I consider learner difficulties and questions and modify instruction.				
Instructional Methods and Strategies				
17. I motivate students by making the content meaningful and relevant				
18. I help students set realistic expectations of how they will use the training when they get back to their units.				
19. I provide opportunities for students to participate and succeed.				
20. I provide examples to help clarify meaning.				
21. I demonstrate procedures.				
22. I keep the instruction focused on the learning goals.				
23. I encourage and manage collaboration between students.				
24. I involve the students in discussions, questions, and reflection.				
25. I ask clear, varied, and relevant questions.				
26. I direct and redirect questions that promote learning.				
27. I provide clear, timely, and specific feedback to students' questions or concerns.				

	Strongly Disagree	Disagree	Agree	Strongly Agree
Instructional Methods and Strategies (cont'd)				
28. I am fair when receiving and giving feedback to the students.				
29. I encourage peer-to-peer feedback.				
30. I draw on student experiences and knowledge during instruction.				
31. I use stories, analogies, and anecdotes to reinforce teaching points.				
32. I provide opportunities to practice new skills.				
33. I provide time for reflection and review.				
34. I increase the complexity of exercises as the student progresses.				
35. I use visual aids that are simple and easy to read and understand.				
36. I can troubleshoot or fix minor technical problems.				
Assessment and Evaluation				
37. I provide clear objectives and instructions on use of assessment criteria.				
38. I respond to questions or concerns about the assessment.				
39. I monitor individual and group performance during practice and assessment.				
40. I provide opportunities for self-assessment by the students.				
41. I provide constructive feedback and opportunities for remediation.				
42. I regularly conduct after action reviews.				
43. I evaluate instructional materials for effectiveness.				
44. I evaluate instructor performance (senior and master instructors).				
45. I evaluate the impact of the instructional setting and equipment (senior and master instructors).				
46. I document and report evaluation data.				
Management				
47. I provide clear expectations and ground rules for learning and interaction.				
48. I effectively address inappropriate behavior.				
49. I manage instructional time effectively.				
50. I provide a positive learning environment.				
51. I use technology to support learning and administrative functions.				
Counseling				
52. I schedule one-on-one counseling sessions with students at the beginning, mid-way and end of training.				
53. I establish performance goals with each student.				
54. I discuss the student's strengths and weaknesses and provide guidance for improvement.				
55. I document counseling sessions.				
56. I am available; I initiate intermittent guidance as needed.				

Appendix H
TF 600-21-1, Noncommissioned Officer Education System (NCOES) Instructor Observation Rubric

The purpose of TF 600-21-1, NCOES Instructor Observation Rubric, is to evaluate an instructor's performance. Instructions for filling out the form are below:

    a. Item 1: Enter the date

    b. Item 2: Enter the start time of the observation

    c. Item 3: At the end of the observation, enter the time

    d. Item 4. Enter the instructor's name

    e. Item 5: Enter the instructor's rank

    f. Item 6: Enter the instructor's unit

    g. Item 7: Enter the class location

    h. Item 8: Enter the course number

    i. Item 9: Enter the class number

    j. Item 10: Enter the lesson title

    k. Item 11: Section 1: Check the appropriate box to rate each item in Section 1 as GO, NO GO, or Not Applicable (N/A).

    l. Item 12: Section 1 Rating: Record the number of NO GOs in the box on this line; if the instructor has been rated 3 or more NO GOs in this Section, then the instructor has not met the requirement for instructor recognition during this evaluation.

    m. Item 13. Section 2 Rating: When you have completed Item 14/Section 2 of your evaluation, enter the instructor's rating for each item in the table, the subtotals, and total score in the designated fields.

    n. Item 14: Section 2: Score each item using the rubric. Indicate the score (0 to 3) that most closely fits what you observed and use the comments section to provide qualifications for your rating. Score the item N/A if it is not applicable to this evaluation.

    o. Item 15: Based on the evaluation, enter any observations, recommendations for improvement.

    p. Item 16: Enter your name and rank

q. Item 17: Sign the form

r. Item 18: The instructor being evaluated signs the form

s. Item 19: Provides date of signature

t. Item 20: Complete the Learning Environment Questionnaire. (This is not used in the instructor's rating/score.)

Appendix I
Course/Lesson Design Checklist

Use the following checklist for the lesson redesign (Senior Army Instructor Badge requirement). If any of the following items are not applicable (N/A), then annotate NA in the Remarks block.

Guidelines	Meets Guideline?		Remarks
	GO	NO GO	
1. Instructional Media Selection			
1.1 If any part of the training requires the student to taste, smell, or touch something while performing the learning objectives, does the training delivery **platform** permit the student to taste, smell or touch the necessary objects?	O	O	
1.2. Does the delivery platform simulate all the necessary elements of the environment in the job setting where the students will apply their knowledge and skills?	O	O	
1.3 Does the delivery platform have the capacity to provide immediate corrective feedback to students when they are practicing?	O	O	
2. Evaluating Course/Lesson Introductions			
2.1. Are the learning objectives of the lessons stated in words that all students will understand about:			
2.1.1. What they will be able to do following the training? *(ACTION or other location in the lesson introduction)*	O	O	
2.1.2. The transfer setting in which they will be able to do it? *(CONDITION or other location in the lesson introduction)*	O	O	
2.1.3. The speed and accuracy with which they will be required to perform it after the training? (STANDARD or other location in the lesson introduction)	O	O	

Guidelines	GO	NO GO	Remarks
2.2. Are the reasons for the lessons stated in words that all students will understand about: The personal benefits of the lessons to the students and risks the students take if they do not learn what is in the training	O	O	
2.3. Do the lesson overviews:			
2.3.1. Relate the content to the students' prior knowledge and experiences?	O	O	
2.3.2. Point out new or unusual elements of what students are learning?	O	O	
2.4. Does each lesson provide an overview of the position of the lesson in the overall training?	O	O	
2.5. Does each lesson describe the instructional strategies that will be used in the lesson?	O	O	
3. Evaluating Conceptual, Process, and Procedural Knowledge Design			
3.1. If the course teaches a concept (how to define or identify new objects, events, locations etc), does the instruction provide:			
3.1.1. A definition of the concept?	O	O	
3.1.2. Examples and non-examples from the job or mission environment?	O	O	
3.1.3. Practice exercises requiring students to identify examples and non-examples of each concept?	O	O	
3.2. If the course teaches a process (how something works), does the instruction:			
3.2.1. Provide a visual model with a narrated description stating the sequence of events in the process in job or mission relevant terms?	O	O	

Guidelines	GO	NO GO	Remarks
3.2.2. Explain how actions at each phase lead to the next phase and to the final outcome of the process?	O	O	
3.2.3. Provide practice exercises requiring the students to describe:			
3.2.3.1. A list of phases in the process?	O	O	
3.2.3.2. The actions that occur at each phase?	O	O	
3.2.3.3. How the consequences of events at each phase contribute to the next phase and the final outcome?	O	O	
3.3. If the course teaches a principle (a cause and effect relationship with predictable outcomes), does the instruction provide:			
3.3.1. A definition of the principle and the cause and effect relationship?	O	O	
3.3.2. Examples that show the effect of the principle from the job or mission environment?	O	O	
3.3.3. Practice exercises requiring students to troubleshoot a problem or predict an outcome using the principle?	O	O	
3.4. When teaching procedures (how to knowledge), does the course:			
3.4.1. Provide a clear step-by-step how-to demonstration, of decisions and actions needed by students to accomplish the task?	O	O	
3.4.2 Are demonstrations based on job or mission relevant scenarios?	O	O	

Guidelines	GO	NO GO	Remarks
3.4.3. Where decisions are taught, include alternatives that must be considered and the criteria that should be used to choose the best alternative in routine situations?	O	O	
3.4.4. Provide practice exercises requiring students to perform the procedure?	O	O	
4. Practice, Feedback, and Assessment Design			
4.1. Do all lessons include practice?	O	O	
4.1.1. Is part-task practice followed with whole task practice?	O	O	
4.1.2. Does whole-task practice mirror the mission environment?	O	O	
4.1.3. Does practice begin with simple problems and progress to more complex problems?	O	O	
4.1.4. Does practice require students to solve increasingly novel problems?	O	O	
4.1.5. Is there consistency between the practice exercises and the learning objectives?	O	O	
4.1.6.. Are there at least two practice exercises to master each skill (part-task and whole-task)?	O	O	
4.2. During practice, is feedback provided?	O	O	
4.2.1. Is feedback frequent, so that errors do not accumulate?	O	O	
4.2.2. When students make mistakes does feedback:			
4.2.2.1. Acknowledge correct use of strategies or steps and not focus on their mistake?	O	O	
4.2.2.2. Provide students with the opportunity to correct their strategy?	O	O	

Guidelines	GO	NO GO	Remarks
4.2.2.3. Provide the opportunity to review the relevant parts of the demonstration?	O	O	
4.2.3. Do some practice exercises allow for peer critique?	O	O	
4.3. Do the lessons provide a method of assessing *(testing)* student learning by asking them to apply what was learned?	O	O	
4.3.1. Are the assessments aligned with the learning objectives and practical exercises?	O	O	
4.3.2. Do the assessments reflect the performance of the learning objectives in the mission environment as closely as media will permit?	O	O	
5. Evaluating Course/Lesson Summaries			
5.1 Do all lessons promote integrating what was learned into students' everyday life by providing opportunities for students to reflect on or discuss what they learned and/or create or discuss personal ways to use what they learned?	O	O	

Appendix J
Master Instructor Board Materials

J-1. TF 600-21-2, Master Instructor Board Member Appraisal Worksheet

TF 600-21-2 is used by each voting member to record their score for each candidate at the Master Instructor Selection Board and indicate whether the candidate is recommended /not recommended for recognition at the Master Instructor level and badge. Instructions for filling out the form are below:

a. Item 1: Enter the Master Instructor Candidate's name

b. Item 2: Enter the Master Instructor Candidate's rank

c. Item 3: Enter the NCOA name

d. Item 4: Enter the NCOA location

e. Item 5: Section 1. Each voting member will score the candidate in areas a, b, & c by entering a numerical number between 1-20 in the appropriate column in Section 1. Area d evaluates the candidate's knowledge of instructor competencies. Each voting member will ask a specific question related to a competency and enter a numerical score in area d between 1-40 points in the appropriate column.

f. Item 6: Each voting member will tally the total points they have awarded the candidate and enter the sum in Total Points column.

g. Item 7. Section 2. Each voting member indicates whether they recommend/not recommend the candidate for Master Instructor.

h. Item 8: Remarks. This is an optional field for each voting member to annotate comments specific to their ratings, as needed.

i. Item 9: Signature of board voting member.

j. Item 10: Enter the date of signature

J-2. TF 600-21-3, *Master Instructor Board Recommendation*

TF 600-21-3 is used to record Senior Instructor's performance at the Master Instructor Board and indicate whether the candidate is recommended /not recommended for recognition at the Master Instructor level and badge. Instructions for filling out the form are below:

    a. Item 1: Enter the Master Instructor Candidate's   name

    b. Item 2: Enter the Master Instructor Candidate's rank

    c. Item 3: Enter the NCOA name

    d. Item 4: Enter the NCOA location

    e. Item 5: Section 1.Using each of the Master Instructor Board Member's Appraisal Worksheets, enter each voting board members name, indicate whether they recommended the candidate for recognition at the Master instructor level or not, and record the points each member awarded in areas a, b, c, and d.

    f. Item 6: Add the number of points awarded by each voting member (columns a, b, c and d) and enter the sum in column e (Totals) for each member

    g. Item 7: Add all of voting members scores together (from column e) and enter the total in Total Board Points

    h. Item 8: Divide the Total Board Points by the number of voting board member to calculate the Average points awarded.

    i. Item 9: Type/Print the recorder's name, rank and date

    j. Item 10: Signature of recorder

    k. Item 11: President of the board indicates whether the candidate is or is not recommended for Master Instructor by the board.

    l. Item 12: Signature of Master Instructor Board president

    m. Item 13: Enter the date of signature

J-3. Master Instructor Selection Board Sample Questions

Sample Questions. The domains, their related competencies, and some sample questions for each domain are provided below for your use. These questions are not an exhaustive list; rather they are meant to assist board members in developing questions. The third domain, Instructional Methods and Strategies has the greatest number of competencies associated with it and for that reason you may want to ask more questions in this domain. You may also want to review the Instructor Competencies and Outcomes at the Master Instructor level (See appendix D).

Table J-1
Sample Questions for MISB

Domain 1	Competencies
Professional Development	• Communicate effectively • Update & improve one's professional knowledge & skills • Comply with established ethical & legal standards

Sample Questions:

a) How have you been proactive in your professional development in the last year? What are your plans for next year?

b) Talk about an instance in your career when after careful reflection, you recognized an opportunity for professional and/or personal growth.

c) How do you promote ethical and legal behavior among students, and colleagues?

d) Tell me about your involvement in your NCOA instructor program. Discuss some of the strengths and/or weaknesses of it and suggest some ways it can be improved.

e) Describe the process you use as an active listener to convey to the student that he/she has your attention.

f) Describe a situation where you identified a communication problem that affected learning and steps you took to improve the situation?

Domain # 2	Competencies
Planning and Preparation	• Plan instructional methods and materials • Prepare for instruction

Sample Questions:

a) How do you apply current research to teaching and learning? What recent research have you integrated into or considered using in your training?

b) Are you familiar with any sources (literature, organizations, people) that validate/invalidate popular myths and trends in learning?
c) What factors do you consider when planning your instruction?

d) What are two most important factors you would consider in preparing to deliver classroom instruction and why?

e) Name two things you do prior to teaching to prepare yourself.

Domain 3	Competencies
Instructional Methods and Strategies	• Stimulate and sustain learner motivation and interest • Demonstrate effective presentation skills • Demonstrate effective facilitation skills • Demonstrate effective questioning skills • Provide clarification and feedback • Promote retention of knowledge and skills • Promote transfer of knowledge and skills • Use media and technology to enhance learning and performance

Sample Questions:

a) Describe some strategies you use to develop students as lifetime learners.

b) How important do you view student motivation in learning? How do you initiate and sustain learner motivation in your classroom?

c) How do you meet the needs of a variety of learners in your classroom? What learning opportunities do you present to meet their needs?

d) Have you ever had to work with students whose level of expertise exceeded your own? How did you handle it?

e) What rules do you follow to match a learning strategy to the learning objective?

f) Can you give some examples of question stems or activities you use to initiate group discussions? ' (What is a new example of ___?', What would happen if____? How would you use _____ to _____?)

g) What technology have you used in your classroom and how has it affected student learning?

h) How would you teach a procedure?

i) Why is practice so important?

j) Why do experts/SMEs often have difficulty teaching procedures?

k) How would you differentiate between a presenter, a facilitator, and a teacher?

l) What does cognitive load mean and what impact does it have on learning?

m) Talk about the ways you provide feedback in the classroom (positive and negative).

n) Describe steps that you take to ensure students are retaining what they need to learn?

o) When you are redesigning or designing a lesson, how do you decide what instructional methods and media to use in the lesson?

Domain # 4	Competencies
Assessment and Evaluation	• Assess learning and performance • Counsel students • Evaluate instructional effectiveness

Sample Questions:

a) What are three uses for assessments?

b) Give an example of a problem you saw in a lesson and what you did to correct it.

c) What are some indicators that tell you that your students understand?

d) How do you think counseling affects Soldier learning?

e) Describe a difficult counseling session you had with a Soldier and how you handled it

f) What data do you use to evaluate instructional effectiveness?

g) What changes would you make to the Lesson Design Checklist and why?

Domain # 5	Competencies
Management	• Manage an environment that fosters learning and performance • Manage an instructional process through the appropriate use of technology

Sample Questions:

a) Tell us about your classroom management style. How do you establish expectations and ground rules for your students?

b) Describe a situation you encountered with a disruptive student/Soldier and tell us how you handled it.

c) Time management is critical to ensure that instruction proceeds at a steady, appropriate pace. Describe some strategies/techniques you use in the classroom to enforce/encourage regular participation, timely submission of assignments, group discussions, learner progress, unexpected situations, etc.

d) As an on-line instructor, how do you determine if a student is falling behind and what do you do to get him caught up? What skills are you trying to develop in the student?

Glossary

Section I
Abbreviations

ABIC	Army Basic Instructor Course
AdLIC	Asynchronous Distributed Learning Instructor Course
AFSC	Advanced Facilitator Skills Course
AIM	Advanced Instructional Methods
AR	Army Regulation
DA	Department of the Army
ERB	enlisted record brief
FDP	Faculty Development Program
FIFC	Foundation Instructor Facilitation Course
FTDC	Foundation Training Developer Course
IBSTPI	International Board of Standards for Training, Performance and Instruction
IDRP	Instructor Development and Recognition Program
IFSC	Intermediate Facilitation Skills Course
INCOPD	Institute for Noncommissioned Officer Professional Development
MIB	Master Instructor Board
NCOA	Noncommissioned Officer Academy
NCOER	Noncommissioned officer evaluation report
NCOES	Noncommissioned Officer Education System
PDSI	Personnel Development Skill Identifier
SGITC	Small Group Instructor Training Course
SATBC	Systems Approach to Training Basic Course
SdLIC	Synchronous distributed Learning Instructor Course
TF	TRADOC Form
TQI-M	Teacher Quality Index-Military
TRADOC	United States Army Training and Doctrine Command

Section II
Terms

Technical Instructor
An instructor who is not assigned to a NCOA as an instructor/writer but directly supports a NCOA commandant's academic mission by teaching MOS specific courses.

Section III
Special Abbreviations and Terms

NCOES Instructor Observation Rubric

Date: _____   Start Time: _____   End Time: _____

Instructor's Rank/Name/Unit: _____

Class Location: _____   Course #: _____   Class #: _____

Lesson title _____

Section 1 – Score items as Go, No Go, or Not Applicable (N/A)

	Go	No Go	N/A		Go	No Go	N/A
a) Visitor's Folder Present	☐	☐	☐	i) Risk Assessment Worksheet	☐	☐	☐
b) Visitor's Sign-in Log	☐	☐	☐	j) Blank Evaluation Form	☐	☐	☐
c) Class Roster	☐	☐	☐	k) Individual Student Assessment Plan	☐	☐	☐
d) Accurate Training Schedule	☐	☐	☐	l) Explained TLO	☐	☐	☐
e) POI/CMP	☐	☐	☐	m) Explained Safety Requirements	☐	☐	☐
f) Instructor Biography	☐	☐	☐	n) Explained Risk Level	☐	☐	☐
g) Instructor Certification	☐	☐	☐	o) Stated Environmental Considerations	☐	☐	☐
h) Applicable Waivers	☐	☐	☐	p) Identified Administrative Procedures	☐	☐	☐
				q) Other	☐	☐	☐

Section 1 Rating. If an instructor has been rated 3 or more NO GOs in Section 1, then the instructor has not met the requirement for instructor recognition during this evaluation. Record the number of NO-GOs in the box on this line. ☐

Section 2 Rating. When you have completed your evaluation, enter the instructor's rating for each item in the table below and then enter their total score.

Column A		Column B	
Item	Score	Item	Score
1. Motivator		9. Assess Learning and Performance	
2. Evaluation Strategy		10. Summary	
3. Lead-In		11. Use of Training Materials and Technology	
4. Presentation/Facilitation Skills		12. Prepare for Instruction	
5. Questioning Skills		13. Effective Communication	
6. Demonstration		14. Classroom Management	
7. Practice/Practice Exercises		15. Professional Credibility	
8. Clarification and Feedback		16. Ethical and Legal Standards	
Subtotal		Subtotal	
		Total Score:	

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Section 2 – Score each item using the rubric. Indicate the score that most closely fits what you observed and use the comments section to provide qualifications for your rating or, annotate if there were a few things that may have kept the instructor from fitting perfectly in the next category rating.

Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
1) Motivator/ Motivation ☐ (Competency: 7)	Captured students' attention by presenting a realistic situation they may encounter in their operational environment and showed how the learning objective will resolve the problem; sustained motivation by providing opportunities for students to participate and succeed; exhibited enthusiasm for learning content; provided timely and meaningful feedback that sustained student interest.	Captured students' attention by informing them of the benefits of the instruction and relevance to job performance; informed students of the risks to job performance if the students could not reach the learning objective; exhibited enthusiasm for learning content.	Gave students a reason to reach the learning objective and indicated some of the risks to job performance if the students could not reach the objective.	Did not meet any of the criteria	
2) Evaluation Strategy ☐ (Competency: 15)	Informed students how, when, and where performance of the learning objective would be evaluated and gave verbal examples of evaluation items, or explained evaluation checklist/rubric.	Informed students how, when, and where performance of the learning objective would be evaluated.	Informed students the learning objective will be evaluated, with no further explanation.	Did not meet any of the criteria	
3) Lead-In ☐ (Competencies: 8, 9, 12, 17)	Provided an agenda; queried students to recall prior learning or knowledge that supported the lesson; lesson objectives were stated in words the student understood.	Provided an agenda; informed students how the lesson ties into existing or prior knowledge.	Provided an agenda but did not tie lesson into existing knowledge.	Did not meet any of the criteria	

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Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
4) Questioning Skills (Competency: 10)	Conducted student checks using a variety of question types, as appropriate. Consistently verified students were engaged and understood the material through the use of informal checks on learning. Always explored student understanding by asking varied and relevant questions. Directed and redirected questions effectively to promote learning; assessed student learning and asked appropriate follow-up questions when wrong answers were given.	Conducted student checks in the lesson plan using APCE. Usually used questions to explore clarity, relevance, understanding and significance of student comments. Sometimes engaged students in dialogue when wrong answers were given. Provided opportunities for most students to participate in discussion.	Occasionally conducted student checks in the lesson plan; sometimes used questions to explore clarity, relevance, or significance of student comments. Did not engage students in dialogue when wrong answers were given. Provided few opportunities for students to participate in discussion.	Did not meet any of the criteria	
5) Clarification and Feedback (Competency: 11)	Provided students with opportunity to ask questions; always acknowledged students, and responded in a clear and concise way; addressed questions and clarified the teaching point or set a time to resume conversation with the student. Response was tactful and timely. Recognized signs that some students needed clarification and addressed the issue (lack of involvement, attention and comprehension).	Provided students with opportunity to ask questions and usually acknowledged student comments/questions; responded in a clear, concise way; response was tactful and timely.	Occasionally acknowledged student comments or questions; most of the responses were clear and tactful.	Did not meet any of the criteria	

Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
6) Effective Communication (Competency: 1)	Used a variety of appropriate written, oral, and body language to convey content. Demonstrated mastery of active listening skills (nod, eye contact, etc) to communicate clearly; was non-repetitive. Paraphrased comments and questions to show understanding. Acknowledged diverse perspectives and used language that was appropriate for learning content and audience.	Used clear voice; varied the volume, tone and rate of speech for appropriate effect. Pronunciation was clear and used appropriate vocabulary and proper grammar. Faced the audience; maintained eye contact; movement or positioning was appropriate for methods of instruction; did not block views of training materials. Avoided excessive distracting mannerisms. Acknowledged and responded to students' diverse perspectives.	Used a clear voice and pronunciation was accurate; some variety in communications skills; Sometimes blocked views of training materials and was repetitive. Occasionally seemed uncomfortable with discussions to gain students' perspectives.	Did not meet any of the criteria	
7) Presentation/ Facilitation Skills (Competencies: 8, 9)	Adapted presentation/facilitation to learners needs and involved students through discussion, questions and reflection. Drew on the students experiences and knowledge; promoted interaction with and between students; kept the learning focused on the goals; encouraged and supported collaboration among students to allow students to share experiences and learn from one another.	Explained all teaching points in the lesson plan, presenting content in a variety of ways. Facilitated students' understanding with use of related anecdotes, analogies or examples that were relevant. Drew on the students' experiences and knowledge; promoted interaction with and between students; provided clear directions for activities and kept students focused on learning goals during the activity.	Explained most of the teaching points in the lesson plan. Attempted to facilitate students' understanding with the use of anecdotes, analogies or examples. Presented instruction with minimal references to students' experiences and knowledge; did not provide opportunities for interaction with and among students.	Did not meet any of the criteria	

Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
8) Classroom Management (Competency: 17)	Conducted introductions at the beginning of course; established routine, ground rules and expectations with students. Addressed undesirable behavior effectively, appropriately and on an individual level. Managed individual and group-paced participation avoiding digressions; provided a safe and positive learning environment.	Conducted introductions at the beginning of course; established ground rules and expectations with students. Addressed undesirable behavior effectively and appropriately. Provided a safe learning environment.	Conducted introductions at the beginning of course; established ground rules but did not allow for student discussion of their expectations. Hesitated in addressing undesirable behavior.	Did not meet any of the criteria	
9) Prepare for Instruction (Competency: 5, 6)	Was prepared for lesson (necessary resources, supplies, reference materials and equipment were available and functioning); content was organized for effective presentation and appropriate for student level. Was very knowledgeable with content and could reference specific material in lessons when needed; anticipated potential areas of student difficulty and was prepared to use additional questions, content, examples and/or different strategies to aid learning.	Appeared prepared for lesson (necessary resources, supplies, reference materials and equipment were available and functioning); additional resources (examples, information) were available for complex content; content was organized for effective presentation. Classroom/learning environment was organized, set up and ready for training.	Occasionally seemed unfamiliar with parts of the lesson and supporting materials; used lesson plan extensively and displayed some hesitation referring to materials or using equipment.	Did not meet any of the criteria	
10) Demonstration (Competencies: 8,9)	Provided a relevant context or scenario for the demonstration. Included student participation in the demonstration (as appropriate) and used TTPs to elaborate (as necessary). Explained all of the steps when demonstrating tasks or procedures. Conducted a review of the demonstration through student questioning.	Ensured most students could hear and view the demonstration of the knowledge or skill to be learned. Explained all of the steps when demonstrating tasks or procedures. Solicited student questions about the demonstration.	Ensured some students could hear and view the demonstration of the knowledge or skill to be learned. Explained most of the steps when demonstrating tasks or procedures	Did not meet any of the criteria	

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Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
11) Practice/ Practice Exercise (Competencies:12,13)	Stated the objectives of the practice/ PE; provided clear instructions to students; constantly observed students' progress and consistently measured student progress toward the objective; guided students (as necessary) by questioning student strategies and providing directive feedback. Provided practice/PEs that were increasingly complex (as necessary); identified areas where student require additional practice. Conducted a comprehensive AAR.	Stated the objectives of the practice/PE; provided instructions to students; observed students' progress and occasionally measured student progress toward the objective; guided students (as necessary) by providing directive feedback. Conducted a satisfactory AAR.	Stated the objectives of the practice/ PE; provided instructions to students; observed students' progress; rushed or haphazardly conducted an AAR.	Did not meet any of the criteria	
12) Summary (Competency: 13)	Provided summary using all three elements (Review, Question, and Transition); used different examples from those used in the initial instruction, or specifically referenced student discoveries. Avoided being excessively long with the summary and established another time to address individual questions (as necessary). Provided opportunity for students to explore ways to use what they learned in increasingly complex scenarios.	Thoroughly addressed all three elements in the Summary. **Review:** Wrapped up and reviewed the main points (ELO/LSA). Avoided re-teaching. **Question:** Solicited student questions; addressed students' questions. **Transition:** Linked this training to follow-on training and job environment. Advised or reminded students of materials or necessary preparation for follow-on training.	Hastily addressed all three elements; Read the ELOs and simply asked "Are there any questions?"; provided minimal transition of content to student's job environment and follow-on training.	Did not meet any of the criteria	

Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
13) Assess learning and performance ☐ (Competency: 15)	Clearly stated objectives of the learning activity in words the students could understand. Provided clear instructions and communicated assessment instruments to students (deadlines, rubrics, scoring criteria). Constantly observed students' progress and consistently measured class progress towards the objective. Facilitated learning through constructive feedback and provided opportunities for remediation. Elicited students' reflections/discoveries.	Stated objectives of the learning activity; provided clear explanation of assessment instruments. Observed students' progress and occasionally measured class progress towards the objective. Facilitated learning through constructive feedback but rarely provided opportunities for remediation.	Stated objectives of the learning activity and provided minimal instructions on use of assessment instruments. Occasionally attempted to initiate discussions with students' to assess their progress.	Did not meet any of the criteria	
14) Use of Training Materials and Technology ☐ (Competencies: 14, 18)	Instruction/learning was clearly enhanced through imaginative and/or innovative use of training materials and/or technology. Used visual aids that supported the objectives; explained the use of technology to students as necessary; was proficient in using the technology. Able to troubleshoot or fix minor technical problems.	Instruction was generally effective and not degraded by improper use of training materials and/or technology. Materials were appropriate in number and supported the objective. Media was in synch with the presentation. Equipment was functional and minor problems were resolved effectively.	Use of technology and/or training materials sometimes enhanced the instruction; instructor was not familiar with the technology and materials resulting in loss of training time.	Did not meet any of the criteria	

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Rating	3 Exemplary	2 Accomplished	1 Developing	0 Unacceptable	Comments/Example
15) Professional Credibility ☐ (Competency: 4)	Demonstrated exceptional subject matter expertise with up-to-date knowledge of content and answered questions accurately and thoroughly. Showed respect for the values and opinions of others; accepted feedback and was open to change and improvement. Presented exemplary military appearance and bearing.	Demonstrated subject matter expertise by answering most questions adequately; showed respect for values and opinions of others; presented acceptable military appearance and bearing.	Demonstrated limited subject matter expertise; delayed answering some questions to a later time or inadequately answered them. Followed the lesson plan content and demonstrated difficulty diverging from lesson plan content. Presented an acceptable military appearance and bearing. Was respectful of students.	Did not meet any of the criteria	
16) Ethical and Legal Standards ☐ (Competency: 3)	Respected student confidentiality, anonymity, and rights; avoided real or perceived conflicts of interest. Treated students equally and fairly; protected students PII; adhered to FOUO security designation and foreign disclosure restrictions. Exhibited exemplary Army values of a professional Soldier. Demonstrated knowledge and compliance of copyright laws.	Respected student confidentiality, anonymity and rights; avoided conflicts of interest with students; protected students PII, adhered to FOUO security designation and foreign disclosure restrictions. Exhibited Army values of a professional Soldier. Complied with copyright laws.	Demonstrated qualities (demeanor and appearance) expected of a professional Soldier; treated students equally and fairly and was respectful of students' rights. Could not always provide justification for use of copyrighted materials.	Did not meet any of the criteria	

Recommendations:

Evaluator's Name/Unit: _____ Signature _____

Instructor's Signature _____ Date: _____

Learning Environment (not scored for Instructor Observations)

Was the environment (field or classroom)

Clean? _____

Relatively free from outside noise or distractions? _____

Well lit? _____

Large enough to conduct the planned activities? _____

Well ventilated? _____

Comments:

TRADOC Form 600-21-1-R-E   For use of this form see TRADOC Regulation 600-21; the proponent agency is INCOPD

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Master Instructor Board Member Appraisal Worksheet
For use of this form see TRADOC Regulation 600-21; the proponent agency is INCOPD.

Instructions: Each voting member should complete this worksheet for each Master Instructor candidate. Each voting member will score the candidates in Section 1 areas of evaluation: a, b and c, and score the candidates response to their specific questions in area d (Instructor Competencies) of this worksheet. Voting members should indicate whether they recommend or do not recommend the candidate for Master Instructor in Section 2. The voting board member should sign the worksheet. Areas a-c have a maximum score of 60 points; area d has a maximum score of 40 points; the maximum total is 100 points. In TR 600-21, see Chapter 5 for additional guidance and Appendix J for Sample Board Questions.

Master Instructor Candidate's Name: _____ Rank: _____

NCOA Name: _____ Location: _____

Board Member's Name: _____ Rank: _____

Section 1. Board Interview and Evaluation Points Awarded

Areas of Evaluation	Average (1-5 points)	Above Average (6-10 points)	Excellent (11-15 points)	Outstanding (16-20 points)	Total Points
a) Personal Appearance, Bearing, and Self-Confidence					
b) Oral Expression and Conversational Skills					
c) Soldier's Attitude					
	Average (1-10 points)	Above Average (11-20 points)	Excellent (21-30 points)	Outstanding (31-40 points)	
d) Instructor Competency					
				Total Score	

Section 2. Recommendation

☐ I do ☐ I do not recommend the candidate for Master Instructor.

Remarks:

_____ _____
Board Member Signature Date

TRADOC Form 600-21-2-R-E, July 2013

Master Instructor Board Recommendation

For use of this form see TRADOC Regulation 600-21; the proponent agency is INCOPD.

Instructions: The board recorder will complete this form for each Master Instructor candidate. The recorder will enter the ratings from each board member's appraisal worksheet on this form and total the scores. The completed form should be provided to the board president for review and signature.

Master Instructor Candidate's Name: _____   Rank: _____

NCOA Name: _____   Location: _____

Section 1. Board Members and Scores

Board Member's Name	Recommended		Points Awarded				
	YES	NO	a	b	c	d	Totals
	☐	☐					
	☐	☐					
	☐	☐					
	☐	☐					
	☐	☐					
	☐	☐					

Add all of the voting member scores together to calculate the Total Board Points.	**Total Board Points**	
Divide Total Board Points in block above by the number of Voting Board Members to calculate the average points awarded.	**Average Points**	

Note: There is not a specific "passing" score for recognition; however, we recommend that the board look for a minimum average score above 80 and all members recommended the Soldier for Master Instructor.

Section 2. Recommendation

_____   _____

Typed or Printed Name of Recorder   Rank

_____   _____

Signature of Recorder   Date

Individual ☐ is ☐ is not   recommended for Master Instructor by the board.

_____   _____

Master Instructor Board President's Signature   Date

TRADOC Form 600-21-3-R-E, July 2013